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Personal Agent User Guide

NORTEL

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Contents

Welcome vii

Audience vii
Text conventions viii
Acronyms viii
Related publications viii
How to get help ix

Getting started with the Personal Agent 1

What is the Personal Agent? 1
Personal Agent services and features 2
Before you begin 2
Minimum hardware and software requirements 3
Recommended hardware and software requirements 3
Useful terms to know 4
Service package 4
Address 4
Click to call 5
Global address book 5
Personal address book 5
Friends 5
Presence 6
Defining routes 7
Personal Agent Carrier Intelligent Network service 7
Accessing the Personal Agent for the first time 8
Logging in to the Personal Agent 10
Understanding the Personal Agent interface 13
Navigating the Personal Agent Quick Start landing page 14
Exiting the Personal Agent 15
Using the online help 15
Starting the Multimedia Web Client 16

Managing your preferences 17

Setting up your personal preferences 17

Modifying your contact information 18
Changing your password 19
Selecting a picture ID 21
Setting up My Times date and time ranges 23
Adding a new day and time range 23
Modifying a day and time range 27
Copying a day and time range 28
Renaming a day and time range 28
Deleting a day and time range 28
Modifying your Nortel IP Phones 2002 and 2004 29
Creating a subject list for your Nortel IP Phones 2002 and 2004 calls 29
Changing the subject list order 30
Specifying reject reasons 31
Changing the order of the list of reasons 33
Personalizing your presence 34
Checking the settings of Nortel IP Phones 2002 and 2004 35
Viewing and modifying your available services 36
Viewing your service package information 37
Viewing and modifying your Watchers List 41
Setting up a Banned watcher's list 42
Modifying your Automatic presence service 43
Viewing and modifying your Unified Communications details 44
Setting your greeting message 45
Modifying your current greeting settings 46
Changing your PIN 47
Setting your email preferences 48
Controlling your automatic login 49
Setting recording time for incoming voicemail messages 51
Viewing and modifying your Meet Me conferencing details 51
Modifying your call park 53
Setting Calling Line Identification 54
Creating and maintaining your directories 57
Understanding Personal Agent address books 57
Using your personal address book 58
Viewing your contacts in List view 60

Sorting your contacts 60
Searching for a contact 61
Viewing details about a contact 63
Initiating a call to a personal address book contact 64
Viewing your contacts 65
Viewing your contacts in Card view 65
Viewing details about a contact 67
Managing your contacts in your personal address book 68
Adding a contact to your personal address book 69
Editing a contact 70
Editing a contact - List view 70
Editing a contact - Card view 71
Deleting a contact 73
Adding a new group 73
Designating a contact as a Friend 74
Using the global address book 77
Accessing the global address book 78
Working with the global address book - List view 81
Sorting users 81
Searching for a user 82
Viewing details about a user 84
Initiating a call to a global address book user 85
Working with the global address book - Card view 85
Adding global address users to your personal address book 87

Working with call logs 91

Viewing call logs 91
Calling contacts from the call log 92
Saving contacts from the call log information 94
Clearing call log information 94

Using Click to call to make calls. 97

Using the Click to call icon 98
Using Click to call from your personal address book 102
Using Click to call from the global address book 105

Using the Personal Agent Route Wizard 107

What is routing? 108
What is the Personal Agent Route wizard? 108
Understanding the Route wizard steps 109
Navigating the Route wizard 109
Using the Personal Agent Route wizard 110
Step 1: Initiating action 111
Step 2: Specifying conditions 112
Specifying contacts from your personal address book 113
Specifying users from the global address book 114
Specifying groups 116
Specifying telephone numbers 118
Specifying a condition for an anonymous incoming call 119
Specifying a condition for ‘Unavailable Busy’ 120
Specifying Day/Time ranges 121
Step 3: Actions 123
Specifying ordered lists 124
Specifying an ordered list for an incoming call 125
Specifying a rejection message 127
Specifying an email request 130
Step 4: Exceptions 130
Step 5: Finish 132
Understanding Address Book Search Criteria 133

Personal Address Book search criteria 134
Global Address Book search criteria 136
Index 139

Welcome

This guideprovides you with instructions you need to get up and running with the Personal Agent. The guide describes the Personal Agent, a feature-rich, online user interface, Internet Protocol (IP) telephony solution. Using the Personal Agent, you can view, manage, and configure services to your personal preferences. Moreover, you can perform these functions from any location with no software download.

This guide includes the following sections:

- "Getting started with the Personal Agent" on page 1
- "Managing your preferences" on page 17
- "Creating and maintaining your directories" on page 57
- "Working with call logs" on page 91
- "Using Click to call to make calls" on page 97
- "Using the Personal Agent Route Wizard" on page 107
- "Understanding Address Book Search Criteria" on page 133

Audience

This guide is intended for subscribers of the Personal Agent services and features. We recommend that you keep your Personal Agent open when you follow the steps described in this guide.

Screen captures in this guide show Internet Explorer as the default browser. However, if you are using another browser (for example Netscape), your screen may look slightly different.

Text conventions

This guide uses the following text conventions:

bold text	Indicates the command key or link you need to press or click Examples: Press **Ok**. Click **Help**.
italic text	Indicates new terms, document titles for reference

Acronyms

This guide uses the following acronyms:

DN	Directory Number
IM	Instant Message
IP	Internet Protocol
MCP	Multimedia Communication Portfolio
MCS	Multimedia Communication Server
PA	Personal Agent
PAD	Personal Audio Device
PIN	Personal Identification Number
PNG	Portable Network Graphic
QoS	Quality of Service
SIP	Session Initiation Protocol
URL	Universal Resource Locator (internet address)

Related publications

Other related publications related to the Personal Agent:

- *MCS Client User Guide*
- *MCS 5200 Feature Description Guide*
- *Nortel IP Phone 2002 User Guide*

- *Nortel IP Phone 2004 User Guide*
- *Assistant Support and Assistant Console Getting Started Guide*
- *Unified Communications Quick Reference.*

How to get help

For service issues, please contact your local support or Information Services team.

Chapter 1
Getting started with the Personal Agent

Topics in this section include

- "What is the Personal Agent?" on page 1
- "Personal Agent services and features" on page 2
- "Useful terms to know" on page 4
- "Logging in to the Personal Agent" on page 10
- "Understanding the Personal Agent interface" on page 13
- "Exiting the Personal Agent" on page 15
- "Using the online help" on page 15
- "Starting the Multimedia Web Client" on page 16

What is the Personal Agent?

The Personal Agent is a powerful tool that allows you to more effectively manage your services and communication preferences on your system. The Personal Agent is your own communications concierge, ensuring that your calls are delivered wherever and whenever you would like.

Personal Agent services and features

The Personal Agent solves the problem of having a different contact number for your office phone, home phone, mobile phone, and other communications devices. Using the Personal Agent, you can direct incoming calls to ring all of these devices at the same time or in a sequence.

Personal Agent features allow you to

- define how your incoming calls will be treated
- view and customize your personal information and services (including viewing the presence of another user in your domain)
- manage, track, and maintain key contact information
- establish a call between you and another contact
- start the Multimedia Web Client from the Personal Agent
- share files with other Personal Agent users or Multimedia Web Client users

Before you begin

You need the following items to start using the Personal Agent:

- the URL to access the Personal Agent
- user name and password for login (provided by your system administrator)

- PC configured with the required minimum software and hardware (See "Minimum hardware and software requirements" on page 3.)
- internet access and a connection that meets the minimum transmission speed requirements

Minimum hardware and software requirements

- 200 MHz Pentium class or equivalent processor
- No additional free RAM is required. (The minimum memory requirements of your browser must be met. See your browser documentation for more information.)
- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for information on the minimum disk space requirements.)
- Mouse (optional)
- 640x480 @8bpp (256 colors) VGA graphics card
- Microsoft Windows* 98 Second Edition (SE), Windows* Millennium Edition (Me), Windows 2000, Windows XP*, or Windows NT* 4.x with Service Pack 5 (SP5)
- 28.8 Kbps modem
- Netscape Communicator* 7.0 or Internet Explorer* 6.0
- Cookies and javascript enabled

Recommended hardware and software requirements

- 300 MHz (or higher) Pentium class or equivalent processor
- No additional free RAM is required. (The minimum memory requirements of your browser must be met. See your browser documentation for more information.)
- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for more information on the minimum disk space requirements.)
- Mouse (required)
- 800x600 or higher @16bpp (65,536 colors) VGA or better video graphics card
- Microsoft Windows 98 Second Edition (SE), Windows 2000, Windows XP, or Windows NT 4.x with Service Pack 5 (SP5)

- 56Kbps modem or other high speed connection (For example, cable modem, DSL modem, 10baseT ethernet, and so forth)
- Netscape Communicator 7.1 and above, or Internet Explorer 6.0 and above
- Cookies and javascript enabled
- Disable the pop-up blockers when using the Personal Agent to ensure that the the pop-ups associated with the Personal Agent appear on your screen.

Useful terms to know

The Personal Agent uses some terms that may be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms.

Service package

Your service provider or system administrator assigns a service package with pre-defined features and options for you. Some features are only available to you if they are listed in your service package. For example, your service package defines how many entries in the list of Friends you can have, how many callers you can have join in on an audio conference, and whether you have voice mail enabled.

Address

When a procedure instructs you to enter an address it means entering either a telephone number or a Session Initiation Protocol (SIP) address. A SIP address is a unique identifier of users on the IP network. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any MCS client (Multimedia PC Client or Multimedia Web Client) or Nortel IP Phone 2002 or 2004.

In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in your personal address book.

Click to call

The Click to call feature allows you to initiate a call from any device, for example, a Public Switched Telephone Network (PSTN phone) or registered Multimedia Communication Portfolio (MCP) SIP client, to a specified number.

Global address book

Your global address book is a list of all users in your domain. This list, if enabled in your domain, is maintained by your service provider or system administrator. Using the Personal Agent, you can search for a Username/UserID, Name, First name, Last name, or phone number. You can initiate a call by clicking on an entry in your global address book.

Personal address book

Your personal address book is a key tool for managing addresses. You can save your addresses for quick call (Click to call) access as well as organize addresses into groups. Your personal address book is synchronized across all your network access devices. If you make a change in your personal address book on the Personal Agent, the change automatically appears on your other network access devices (for example, your Multimedia PC Client, Multimedia Web Client, and/or your Nortel IP Phone 2002 or 2004).

Friends

Within your personal address book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry in the Multimedia PC Client, Multimedia Web Client, or Nortel IP Phone 2002 or 2004.

Note: The ability to designate entries as Friends is a feature of the Presence service and is dependent upon your service package. If your service package does not support the Presence service, then you cannot designate entries as Friends.

Presence

- **Presence:** a service on the Multimedia PC Client, Multimedia Web Client, or Nortel IP Phone 2002 or 2004 that allows you to see the online status of other users on your network and also a way to alert others to your status.
- **Automatic presence**: a service on the Multimedia PC Client, Multimedia Web Client, or Nortel IP Phone 2002 or 2004 that allows you to set the system to automatically alert others when you are away from your PC or on the telephone.

Note: The ability to configure automatic presence notifications on the Personal Agent is dependent upon your service package. If your service package does not support automatic presence, then you will not be able to use the automatic presence feature.

- **Presence Indicators:** You can determine the status of anyone registered in the system by querying the Personal Agent's global address list. This feature is extremely helpful when sending instant messages or after unanswered calls. The following table lists the Presence states.

Presence Indicator	Status	Description
	Active available	The user is active on their computer. This is an auto presence enabled state and is shown on the user's behalf.
	Active on the phone	The user is active on a call on one of their clients. This is an auto presence enabled state and is shown on the user's behalf.
	Connected	The user is registered on the network.
	Connected inactive	The user has not used their computer for a period of time. The idle timer is able to be configured by the user under the **Preferences > Services > Auto Presence** option.

Presence Indicator	Status	Description
	Connected <user defined>	These are the connected default states (Away, Out to lunch, and Be right back) and any user defined connected states, which identify that the user is registered, but not readily available.
	Unavailable	The user is registered in the network but is busy, or the user is not registered on the network.
	Unknown	No Presence information is available.

Defining routes

With this service, you can define a route list in the Personal Agent. For more information, refer to "Using the Personal Agent Route wizard" on page 110. If you want to set up rules for rejecting calls from specific users, refer to "Specifying a rejection message" on page 127.

Personal Agent Carrier Intelligent Network service

If you are a PSTN user, you can get the Personal Agent Carrier Intelligent Network (PA Carrier IN) service, a service that allows a PSTN user to access the multimedia services through the Personal Agent. You receive a Multimedia Communication Server (MCS) user ID, which is linked to your directory number (DN). Your system administrator provisions the PA Carrier IN service, enabling you to have a Personal Agent-driven Converged desktop. With Converged desktop, you are able to use your PSTN phone for making and receiving voice calls from other MCS users and use your Personal Agent for accessing multimedia services, such as beginning an instant messaging or a collaboration session.

The PA Carrier IN service allows you to

- set up rules and options through a Personal Agent that is Web accessible.
- screen and handle calls based on the caller's DN.

- have a range of phone numbers that share the same rule.
- set up time criteria: time of day, day of week, until, always. A match of the criteria allows activation of a specific ring list.
- program number of rings to wait before trying the next ring list.
- program multiple DNs to ring simultaneously in any part of the user's ring list (SimRing).
- chain ring lists to support sequential ringing.
- have the default routing if no rule applies.
- use the Do not disturb mode.
- optionally block anonymous calls.

With this service, you can define specific routes for your incoming calls. For more information, refer to Chapter 6, "Using the Personal Agent Route Wizard," on page 107. Additionally, you can make calls using the Click to call icon from the Personal Agent. For more information, refer to Chapter 5, "Using Click to call to make calls," on page 97.

Accessing the Personal Agent for the first time

To access the Personal Agent for the first time

1. Start your Web browser.
2. Enter the Personal Agent URL (provided by your service provider or system administrator) in your Web browser.

3 Press **Enter**. A Security Alert box appears.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The name on the security certificate is invalid or does not match the name of the site
Do you want to proceed?
Yes
No
View Certificate

4 Click **YES** to proceed to the Personal Agent Login page.

Logging in to the Personal Agent

Before performing any of the functions available in the Personal Agent, you must first log in.

Note: Keep in mind that you can time out due to inactivity.

Additionally, you can be prevented from logging in to the Personal Agent if the login credentials that you provide are incorrect. The Personal Agent will temporarily lock your user account each time incorrect credentials are provided for a period of three seconds after each failed login attempt.

To log in to the Personal Agent

1 Enter your user name, domain name (for example: you@yourcompany.com), and password in the Personal Agent Login page.

Tip: Your initial password is provided to you by your system administrator.

2 Click **Login**. The Password page appears, prompting you to change your initial password.

Note: If your system administrator changed your initial password, then you are not prompted to change your password. Instead, you are directly taken to the Quick Start landing page as shown in Step 5.

3 Complete the required fields.

Field	Description
New Password	Your new password **Note:** Consult your system administrator for password criteria.
Confirm Password	Confirmation of your new password
Old Password	Your old password that you entered when you registered with the Personal Agent

Note: When you log in, always use your user ID and root domain name. Never use your sub-domain, if known, to log into the Personal Agent or any other MCS client.

4 Click **Save.**

5 Click **Quick Start** to access the Personal Agent Quick Start landing page.

Understanding the Personal Agent interface

The Personal Agent Quick Start landing page is always your starting point to access all the services and features of the Personal Agent.

Navigating the Personal Agent Quick Start landing page

The following table describes the icons and links on the Quick Start landing page and top navigation menu.

This service/ feature...	Enables you to...
	access to the Quick Start landing page, a road map to the Personal Agent services and features.
	define how you want to manage your incoming calls by specifying the routing and screening of your calls. (The **Routes** icon does not appear without the Advanced service package.)
	manage your account and personal information.
	create, view, and manage your personal address book and view your global address book (if enabled).

This service/ feature...	Enables you to...
	view your inbox and outbox list of calls. Click to call a contact in the list or save it to your personal address book. (The **Call logs** icon does not appear without the Advanced service package.)
	establish a call between you and another person.
	make calls and use other multimedia services. **Note:** The Multimedia Web Client is an optional client that you can use for making calls. Refer to the *MCS Client User Guide* for additional requirements.

Exiting the Personal Agent

To exit the Personal Agent, click the **Logout** icon on the top right of any page you are currently working on.

Using the online help

There are several ways that you can access Personal Agent help:

- online help - from any page, click the **Help** icon, on the top right of any page, to view a task-based help system. The online help provides

— help pages containing forward and backward navigation icons
— procedures that help you use the Personal Agent
— hypertext links to all topics
— a Table of Contents with hypertext links
— an Index with hypertext links

- rollover help - help text with a description and possible values that appear when your mouse pointer moves over a form field or an icon.

Starting the Multimedia Web Client

To start the Multimedia Web Client from the Personal Agent, click the **Multimedia Web Client** icon on the Quick Start landing page or from the top navigation menu.

Chapter 2
Managing your preferences

Topics in this section include

- "Setting up your personal preferences" on page 17
- "Modifying your Nortel IP Phones 2002 and 2004" on page 29
- "Viewing and modifying your available services" on page 36

Tip: Click the **+** and **-** symbols to expand or collapse a menu item on the Preferences page.

Setting up your personal preferences

To set up or modify your personal preferences, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **Personal** submenu item. The following submenu items appear:

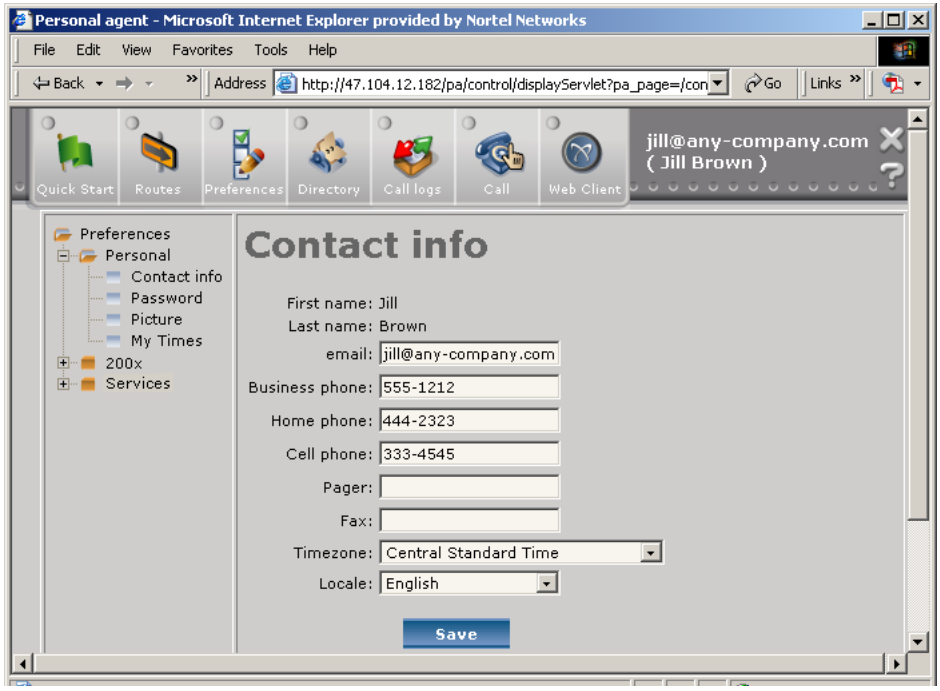
- Contact info
- Password
- Picture
- My Times

Tip: The information you enter in the **Contact info** and **My Times** submenu items is used when setting up routes for your incoming calls. See "Using the Personal Agent Route Wizard" on page 107 for complete information on setting up routes.

Modifying your contact information

To modify your contact information

1 Click the **Preferences>Personal>Contact info** submenu item. The Contact info page appears, allowing you to view or update your contact information.



From this page, you can view your first name, last name, and alias as entered by your service provider or system administrator. You can enter or modify your email address, business, home, cell, pager, and fax phone numbers. You can also modify your timezone and locale.

This field...	Shows...
First Name	your first name as it appears to other users (viewable field only).
Last Name	your last name as it appears to other users (viewable field only).
Alias	an alias (if provisioned) that associates a PSTN phone number with your username (viewable field only).
Email	your email address (for example tsmith@acme.com).
Business phone	your business telephone number.

This field...	Shows...
Home phone	your home phone number.
Cell phone	your cell phone number.
Pager	your pager number.
Fax	your FAX number.
Timezone	your time zone in which your predefined My Times Call Screening times are enforced.
Locale	your language and region for display in different languages, if supported. (You need to logout and login again for changes to take effect.)

2 Complete the fields on the page.

3 Click **Save**. The message "Personal information updated successfully" appears at the top of the Contact Info page indicating that your changes are applied.

Changing your password

When you change your password, your password changes across all MCS clients (Multimedia PC Client, Multimedia Web Client, Personal Agent, and the Nortel IP Phones 2002 and 2004).

To change your password

1 Click the **Preferences>Personal>Password** submenu item. The password page appears.

2 Complete the required fields.

In this field...	Type...
New Password	your new password. **Note:** Consult your system administrator for password criteria.
Confirm Password	your new password again.
Old Password	your old password that you entered when you registered with the Personal Agent.

Tip: For security purposes, it is recommended that you change your password periodically.

3 Click **Save**. The message “Password updated successfully” appears at the top of the Password page indicating that your changes are applied.

Selecting a picture ID

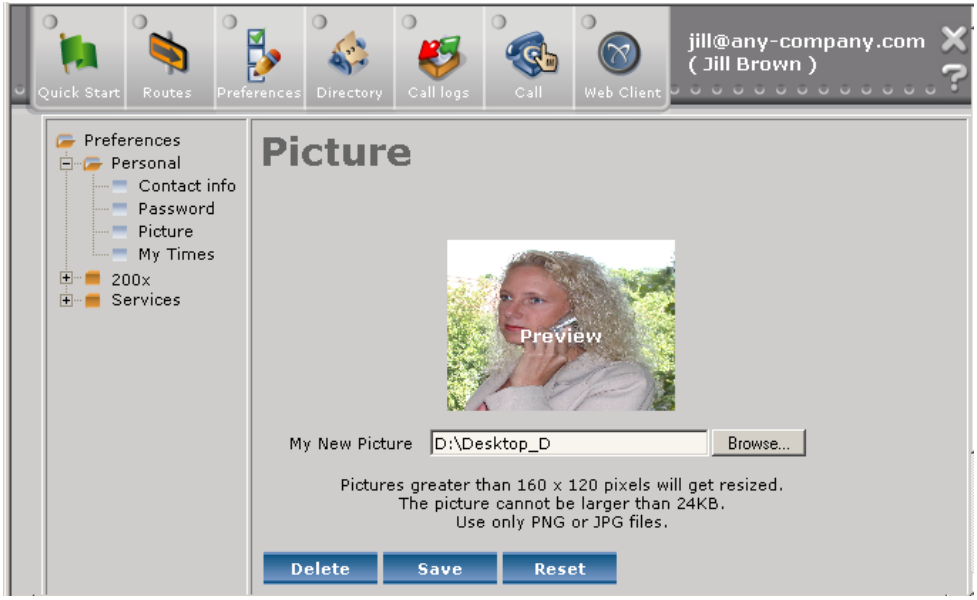
You can add a picture to use as your picture caller ID in the Multimedia Web Client or the Multimedia PC Client. If you are replacing an existing picture ID, then your new picture overwrites the old picture.

To add or modify a picture

1 Click the **Preferences>Personal>Picture** submenu item. The Picture page appears, allowing you to add, view, or update your picture caller ID picture. The first time you access this page you will notice a shadow figure. This indicates that you do not have a picture in the database.

2 Enter the path and file name of the picture to use for your Picture Caller ID service on the Multimedia Web Client or Multimedia PC Client, or click **Browse** and then select the picture file.

3 Preview your picture. You will notice the word “Preview” appears on your picture. The word “Preview” is removed once you save the picture.



Tip: Pictures greater than 160 x 120 pixels will be resized. The picture cannot be larger than 24 KB. Use only PNG or JPG files. However, your system administrator may provision a different picture size for you to load on the Personal Agent.

4 To reset your picture from the preview picture to your current picture, click **Reset**.

5 Click **Save** to save the picture as your picture caller ID. The picture file you specify is sent to your service provider’s user database and appears on the Multimedia Web Client, Multimedia PC Client, and on the Picture page each time you use the Personal Agent. The picture also appears in the address book in "card view" mode. Click **Delete** to delete a picture.

Note: A picture caller ID appears when the contact has been added to the address book of the person being called.

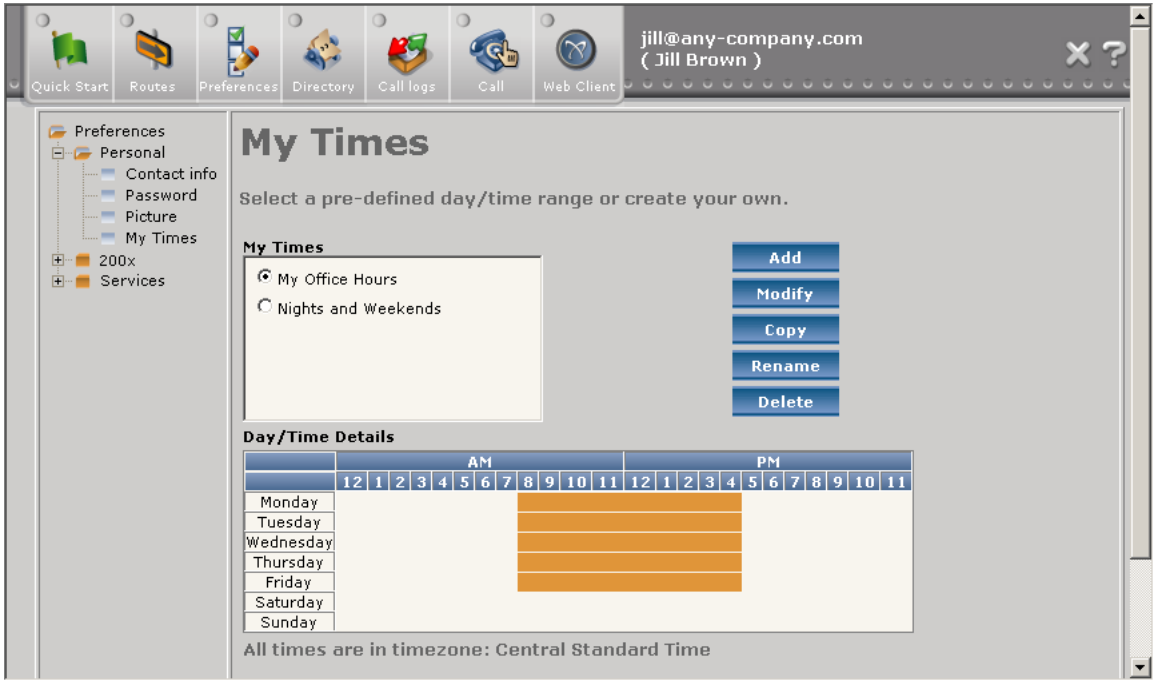
Setting up My Times date and time ranges

If the Advanced screening parameter is enabled in your service package, you can use the My Times page to create, modify, copy, rename, or delete day and time ranges to use when setting up conditions to screen and route your incoming calls.

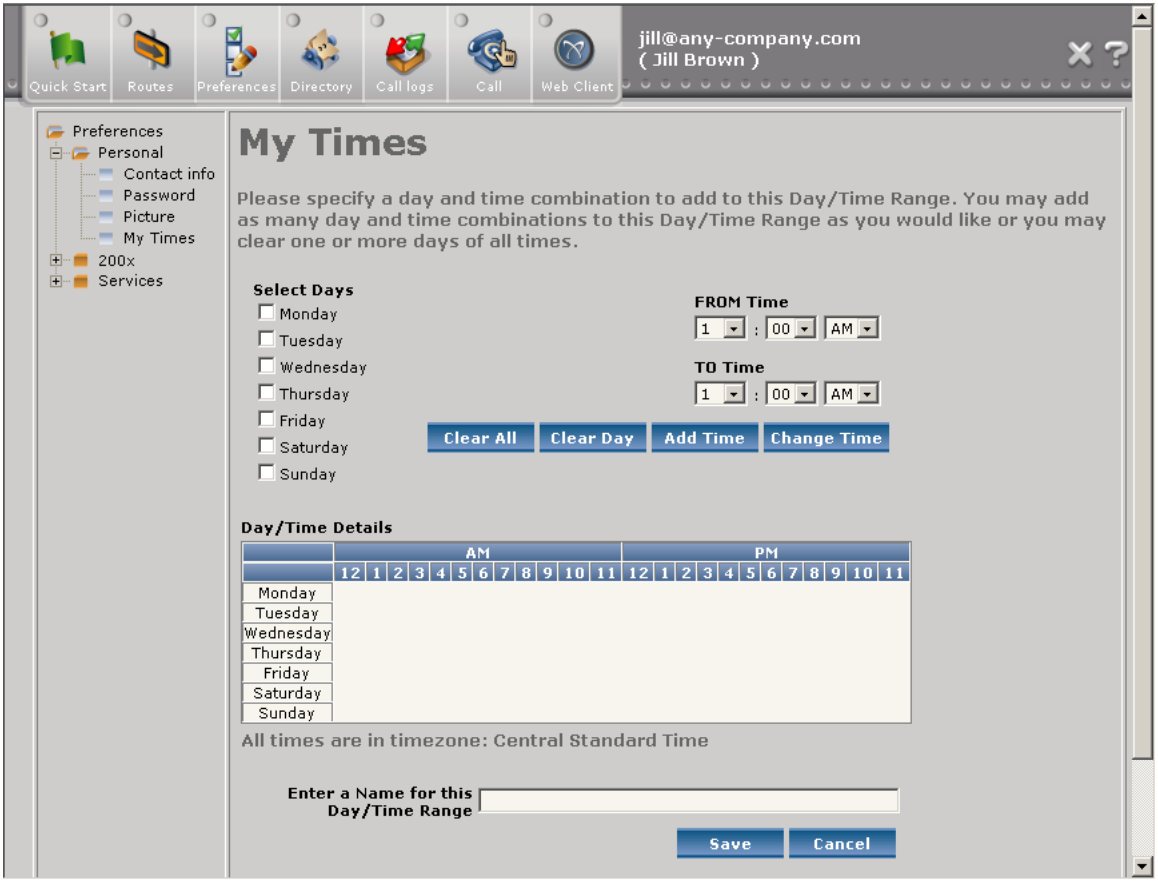
Adding a new day and time range

To add a new day and time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears.The first time you use the Personal Agent, you will see the following default day and time options to choose from in the My Times window:
   - My Office Hours
   - Nights and Weekends
2. Select a default option (for example, My Office Hours). A graphic display for the default time range of 8:00 AM to 5:00 PM, Monday - Friday, appears in the Day/Time Details window.



3 Click **Add**. A new My times page appears (without any Day/Time combinations selected) that allows you to add your desired days and times and create a new Day/Time range.



4 Select your Day/Time combinations.

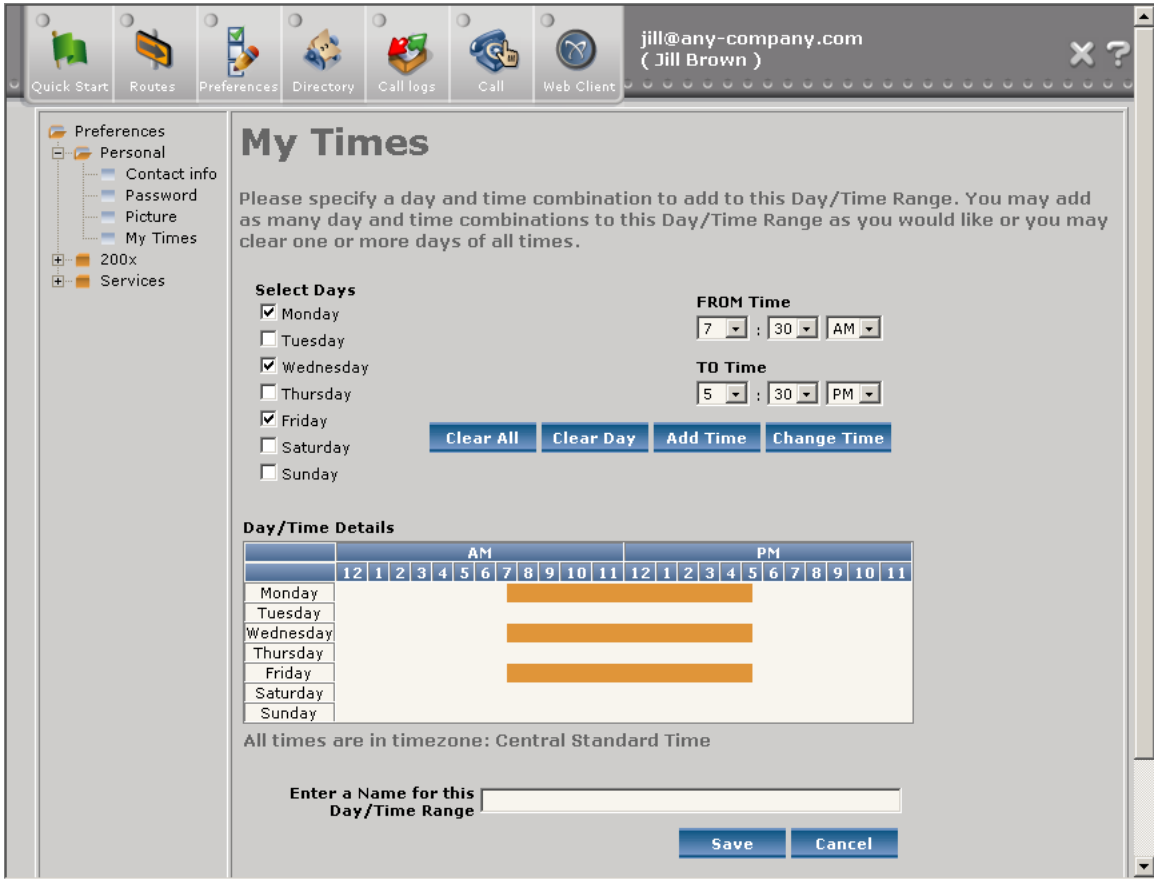
For example, if you work part time, you may want to add a Day/Time combination that will only apply on Monday's, Wednesday's, and Friday's between the hours of 7:30 AM and 5:30 PM. To set up these hours

a Select Monday, Wednesday, Friday in the Select Days column.

b Select 7:30 AM in the From Time drop down lists.

c Select 5:30 PM in the To Time drop down lists.

d Click **Add Time**. The graphic display in the Day/Time Details window is updated with your selected days and times.



5 To add more than one Day/Time combination to apply to the Day/Time range, you can set more options.

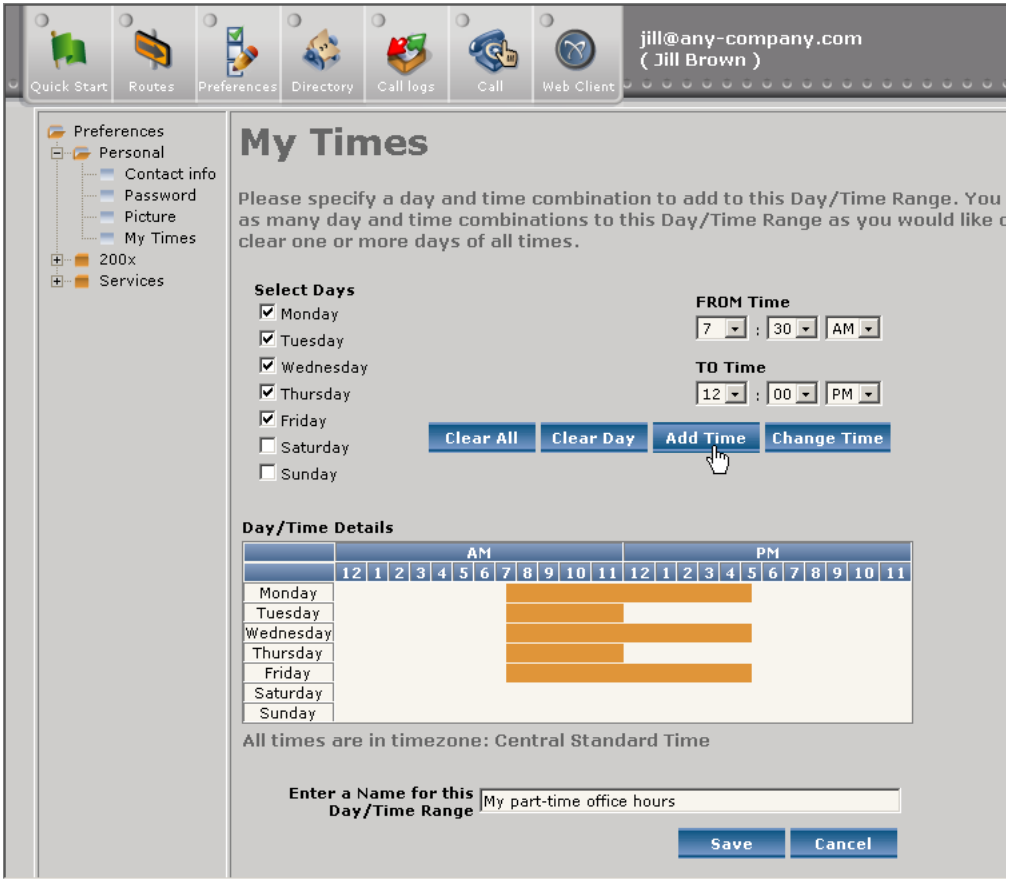
For example, in addition to working part time on Monday's Wednesday's and Fridays, you may work half days on Tuesday's and Thursday's. To set up these hours

a Select Tuesday and Thursday in the Select Days column.

b Select 7:30 AM in the From Time drop down lists.

c Select 12:00 PM in the To Time drop down lists.

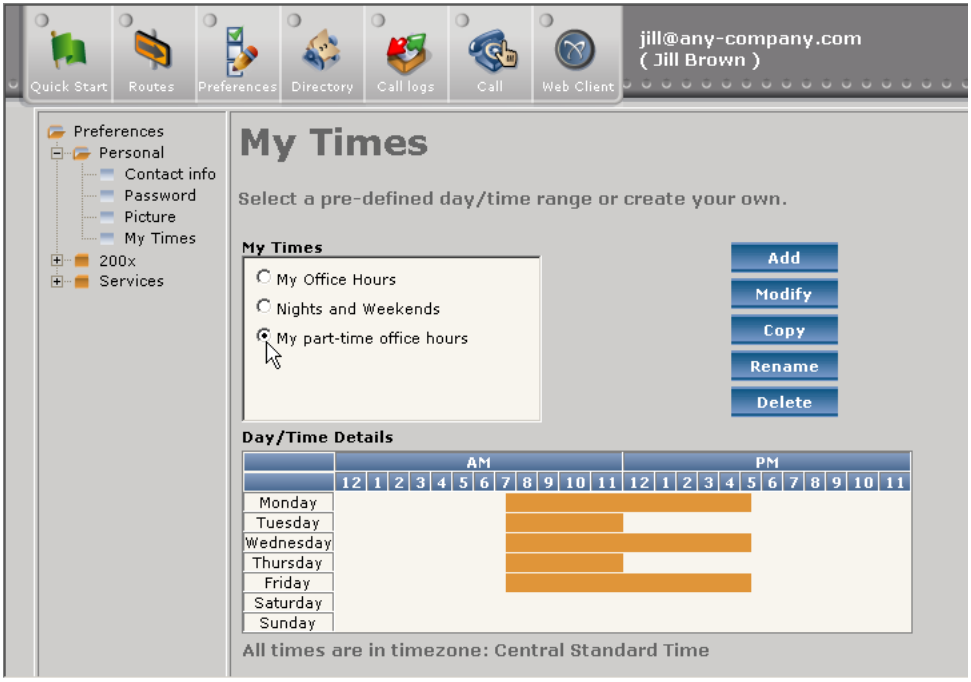
d Click **Add Time**. The graphic display in the Day/Time Details window is updated with your selected days and times.



Tip: To remove all Day/Time ranges for a selected day, check the day in the Select Days column and click **Clear Day**. To remove all Day/Time ranges for all days, click **Clear All**.

6 Enter a name for the Day/Time range in the text box provided.

7 Click **Save** to save your new Day/Time range and combinations, or **Cancel** to return to the My Times page without creating a new range. The new range appears in the My Times window.



Modifying a day and time range

To modify an existing day and time range

1 Click the **Preferences>Personal>My Times** submenu item. The My Times page appears with Day/Times options in the My Times window.

2 Click an option in the My Times window (for example, My Office Hours). A graphic display for the day and time range appears in the Day/Time Details window.

3 Click **Modify**. Enter your changes to the days and time ranges on the My Times page. Click **Add Time.** Your changes appear in the Day/Time Details window.

4 Click **Save** to save your Day/Time changes, or **Cancel** to return to the My Times page.

Copying a day and time range

To copy a Day/Time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears. Select the option you want to copy in the My Times window.
2. Click **Copy**. The My Times copy page appears. Enter a name for the new Day/Time Range.
3. Click **Save** to save your changes, or **Cancel** to return to the My Times page. The My Times page appears with the new Day/Time range in the Day/Time Details window.

Renaming a day and time range

To rename a day and time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears.
2. Select an option in the My Times window.
3. Click **Rename**. The My Times rename window appears.
4. Enter a new name for the Day/Time range.
5. Click **Save**, or **Cancel** to return to the My Times page.

Deleting a day and time range

To delete a day and time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears. Select an option from the My Times window.
2. Click **Delete**.
3. At the confirmation box, Click **OK** to confirm that you want to delete the My Times option, or **Cancel** to return to the My Times page.

Modifying your Nortel IP Phones 2002 and 2004

To set up or modify your Nortel IP Phones 2002 and 2004 preferences, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **200x** menu item. The following submenu items appear:

- **Subjects**
- **Reasons**
- **Personalized presence**
- **Logout**

Creating a subject list for your Nortel IP Phones 2002 and 2004 calls

On the Nortel IP Phones 2002 and 2004, you can select from a list of subjects when you place an outgoing call. The subject appears on the Nortel IP Phones 2002 and 2004 (as well as other registered SIP clients) of the person you are calling to alert them as to why you are calling.

To create a new subject in the list

1 Click the **Preferences>200x>Subjects** submenu item. The Subjects page appears.

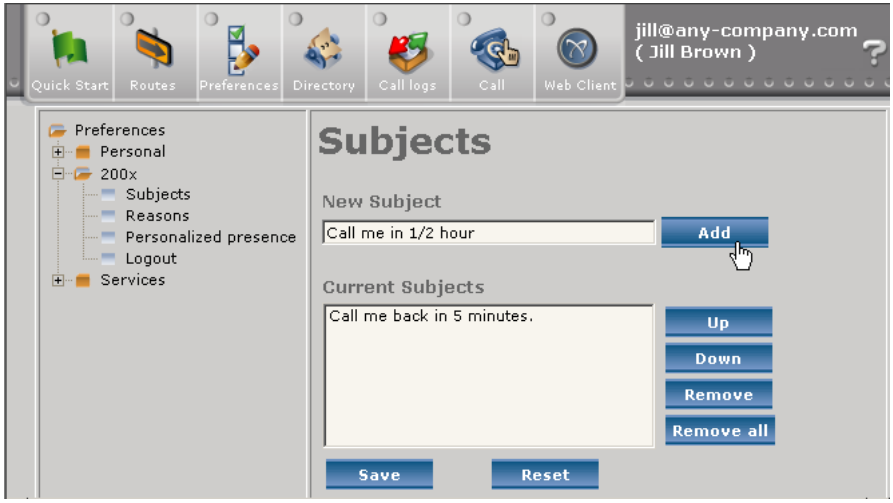
2 Enter the text of the subject in the New Subject field.

3 Click **Add**. The subject text appears in the Current Subjects window.

a To add another subject, enter the text of the subject in the New Subject field.

b Click **Add**. The subject text appears in the Current Subjects window.

c To save your subject list, click **Save.**



4 To remove a subject, select the entry, and click **Remove**. To remove all subjects in the list you created, select all the entries, and click **Remove All**.

5 To save your subject list, click **Save**, or **Reset** to clear your input on the Subjects form.

Changing the subject list order

To specify the order in which the subjects appear on an Nortel IP Phone 2002 and 2004

1 Click on a subject in the Current Subjects window.

2 Click **Up** or **Down** to change the order of the subject list.

3 To save your changes, click **Save**.

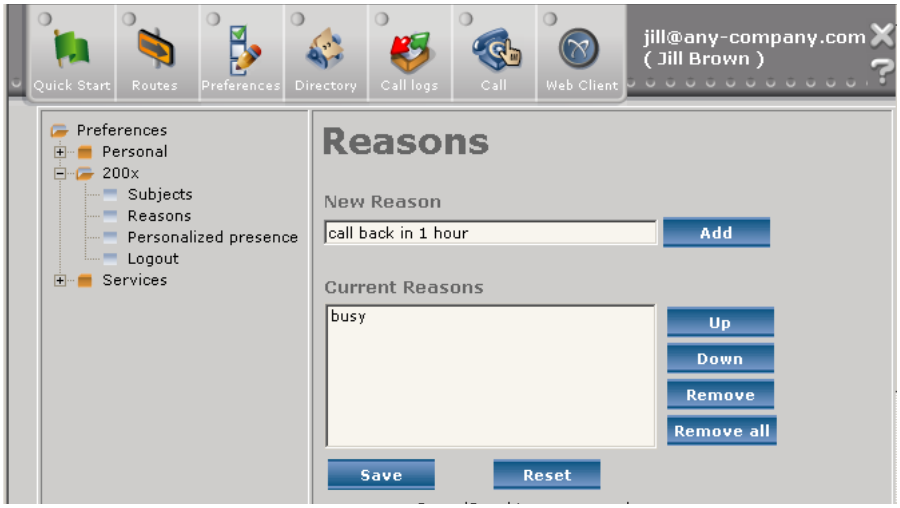
Specifying reject reasons

You can specify a reason or list of reasons to appear on your Nortel IP Phone 2002 and 2004.

To specify a new reject reason or a list of reasons for rejecting an incoming call

1 Click the **Preferences>200x>Reasons** submenu item. The Reasons page appears.

2 Enter the text of the reason (for example, Busy right now or Try again later) in the New Reason field.



Tip: The reasons are displayed in the order that you enter them.

3 Click **Add**. The reason text appears in the Current Reasons window.

a To add another reject reason, enter the text of the reason in the New Reason field.

b Click **Add**. The reason text appears in the Current Reasons window.

4 To save the reason, Click **Save**, or click **Reset** to clear your input and reset your reason list to the last saved settings. (To remove a reason, select the reason and click **Remove**, or **Remove All** to remove all reasons.)

Tip: The reasons appear on your Nortel IP Phones 2002 and 2004 in the same order they appear in the Current Reasons window.

Changing the order of the list of reasons

To reorder the list of reasons displayed on an Nortel IP Phones 2002 and 2004

1. Click on a reason in the Current Reasons window.
2. Click **Up** or **Down** to reorder the reason for display on the Nortel IP Phones 2002 and 2004.

Tip: The reasons appear on your Nortel IP Phones 2002 and 2004 in the same order they appear in the Current Reasons window.

   a. To remove a reject reason from the list, highlight the entry in the Current Reasons list.
   b. Click **Remove** to remove the selected reason, or, click **Remove All** to remove all reasons.
3. To save your changes, click **Save**.

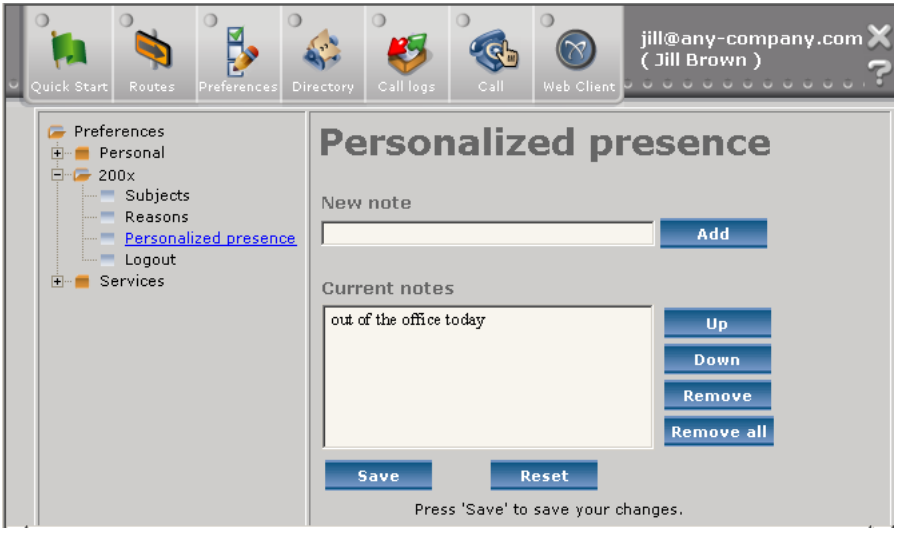
Personalizing your presence

To customize a presence status note for display on the Nortel IP Phones 2002 and 2004,

1. Click the **Preferences>200x>Presence>Personalized presence** submenu. The Personalized presence page appears.

2. Enter a note in the New Note text field to appear on your Nortel IP Phones 2002 and 2004.

3 Click **Add**. The note text appears in the Current notes window.



a To add another note, enter the text of the note in the New Note field.

b Click **Add**. The note text appears in the Current Notes window.

c Click **Up** or **Down** to reorder the presence note for display on the Nortel IP Phones 2002 and 2004.

4 To save the note, Click **Save**, or click **Reset** to clear your input and reset your note list to the last saved settings. (To remove a note, click **Remove**, or **Remove All** to remove all notes.)

Checking the settings of Nortel IP Phones 2002 and 2004

If you work in a number of locations and often log into several Nortel IP Phones 2002 and 2004, you can use the **200x** option to check your login status and log yourself out from an active phone.

To check the login status of an Nortel IP Phone 2002 or 2004

1 Click the **Preferences>200x>Logout** submenu item. The Logout page appears.

2 Look for the Nortel IP Phone 2002 or 2004 that you are logged into based on the Device Label, MAC address, or Users.

Tip: The **200x** option lists a separate entry for each phone you are logged into.

3 Click the **Log Me Out** link, for the Nortel IP Phone 2002 or 2004 you want to log out of. Click **OK** at the confirmation message.

Viewing and modifying your available services

To view or modify the list of services that you are currently subscribed to, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **Services** menu item. The following submenu items appear:

- **Service package** shows the list of services assigned to you by your service provider or system administrator.
- **Presence** allows you to see the online status of other users on the network and also provides a way to let others know your status.
  - **Watchers** shows a list of users that are currently watching your presence information.
  - **Banned watchers** shows a list of users that you have blocked from subscribing to your presence information by selecting the "Ban" option button.
  - **Auto presence** shows settings to automatically alert others when you are away from your PC or on the telephone.

- **Unified Communications** allows you to access multimedia messaging services.
- **Meet Me** provides you with your conferencing bridge information.
- **Call Park** allows you to
  - select whether or not parked calls are returned to you if they are not retrieved (auto-retrieve)
  - change the time setting that determines how long a parked call waits before it is returned
- **Calling Line ID Restriction** blocks your calling line ID information from transmitting when you make a call.

Tip: You may see other menu items depending on your Service Package. Please refer to the documentation for those services.

Viewing your service package information

You can view the services that are available to you from the Service Package page. However, you cannot change any of the service package parameters that you view on this page.

Note: Contact your system administrator to request any changes to your service package.

To view the services enabled in your service package

1 Click the **Preferences>Services>Service package** submenu item. The Service Package page appears, displaying the name of the service package and the services packages assigned to you. The lists of features available will vary with each user, based on the "Service Package" available to them.

Preferences
Personal
200x
Services
Service package
Presence
Unified Communications
Meet Me
Calling Line ID Restriction
Service Package: totalpkg
Voicemail
Meet Me Conferencing
Maximum Number of Participants 12
Audio Recording Enabled No
Web Collaboration Enabled Yes
Video Conferencing Enabled Yes
Premium Conferencing Enabled Yes
Ad Hoc Conferencing
Maximum Number of Ports 5
Presence
Maximum size of client friend list 50
Video
H.263 Video Enabled Yes
Nortel Video Enabled Yes
Advanced Screening
Maximum Number of Telephone Numbers per Ringlist 3
Presence Based Routing Yes
Maximum Number of Ringlists 3
QoS
QoS 802.1p Service Priority 1
QoS DiffServ Code for Signalling 8
QoS DiffServ Code for Audio 10
QoS DiffServ Code for Video 10
Device Access Restrictions
Restriction Level Full Access
Hot Line
Enabled No
Key Label Security Desk
Called URL osn1@ds2sanity1.com
Advanced Addressbook
Maximum Number of Addressbook Entries Allowed 150
Music On Hold
Calling Line ID Restriction
Media Privacy (Media Portal Required) Yes
Network Call Logs
Maximum Number of Inbox Call Logs 50
Maximum Number of Outbox Call Logs 50
IM Chatroom
Unified Communications
Maximum Storage (in minutes) 20
Maximum Message Length (in seconds) 180
Voice Email Delivery Enabled Yes
Personal Agent Enabled Yes
Automatic Identification Enabled Yes
Maximum Number of Messages 50
Wireless Client
10
Instant Messaging
Client Collaboration
Transfer Clipboard Yes
File Transfer Yes
WebPush Yes
White Board Yes
Allowed Clients
PCClientSet Control Yes

2 View the list of services assigned to you.

Note: The following table lists all the services available. However, your subscriber or system administrator may not have all Service Package options. Therefore you may not be assigned some of the services or parameters listed.

If this Service Package option is enabled...	**Then you have the ability to...**
Voice mail	receive and retrieve your voicemail and also receive notification of waiting messages. For information on retrieving voice mail, refer to the *MCS Client User Guide*.
Meet me conferencing	chair an audio, video, or web collaboration conference by sending out a dial-in number and Personal Identification Number (PIN) for a conference bridge.
Ad hoc conferencing	join or conference multiple users together in a call.
Presence	• view the online status of other users and allow others to monitor your status by indicating when your PC is inactive or when you are on the phone. • designate an address book contact as a Friend in order to see that person's presence. The number of friends is determined by the service provider. • prohibit a contact in your domain from viewing your online presence status.
Video	receive and transmit video calls.
Advanced screening	define routes that affect how your calls and instant messages are received. A route allows you to specify locations that will ring simultaneously or sequentially when you receive a call. A route can be defined to only affect specific calls and/or Instant Messages based on a set of conditions selected by the user, for example, the time of day you receive the call and/or who is calling.
QoS	set the following Quality of Service (QoS) parameters: • QoS DiffServ code for signaling • QoS DiffServ code for audio • QoS DiffServ code for video • QoS 802.1p service priority
Converged desktop	use your Multimedia PC Client to access multimedia services, while using your existing telephony system for voice. For more information, refer to the *MCS 5200 Feature Description Guide.*

If this Service Package option is enabled...	Then you have the ability to...
Device Access Restrictions	have full or restricted access to Nortel IP Phones 2002 and 2004 functionality.
Hot Line	call a pre-determined destination by going off hook on the relevant line key. Used in conjunction with the Device Access Restriction service package option.
Advanced Addressbook	have more than 10 contacts (default). The maximum number of contacts is determined your service provider.
Assistant Support Assistant Console	act as an assistant for another person in order to answer and route the calls. Refer to the *MCS Feature Description Guide.*
Music On Hold	provide music to callers that you put on hold.
Call Park	park a call so that another user can pick it up.
Calling Line ID Restriction	block your calling line ID information from appearing on the display panel of other telephones.
Call Waiting Disable	disable the Call Waiting feature.
Net6 Support	configure the Nortel IP Phone 2004 to display Web text. It allows the phone to connect to the Net 6 server to display information from the Web. It also allows a user to perform searches of a corporate directory. For more information, refer to the *MCS 5200 Feature Description Guide*.
Network Call Logs	view the number of inbox and outbox call logs allowed.
IM Chatroom	send IMs to multiple users (for Multimedia PC Client and Multimedia Web Client).
Unified Communications	set up mailbox greetings, change your PIN, set up email preference, and so on. ***Note:*** This feature must be enabled in your service package. For more information, refer to the *MCS Feature Description Guide*.
Wireless client	use a wireless client, such as Blackberry, on the MCS system.
Instant Messaging	send text messages to other users whether or not they are active on the Multimedia PC Client, Multimedia Client Set, Multimedia Web Client, or a Nortel IP Phone 2002 or 2004.
Client Collaboration	transfer files, exchange contents of a Windows clipboard, send and receive website URLs, and share a common drawing window for entering text and graphics.

If this Service Package option is enabled...	Then you have the ability to...
Allowed Clients	use the Nortel IP Phone 2002 or 2004 for premium voice calls, while the Multimedia PC Client is dedicated to the data and video components of the multimedia conversation.
Subscriber OPI	build clients using the Subscriber Open Provisioning Interface (SOPI) to manage subscriber information.
Multiple Login Restriction	limit the number of simultaneous logins for a MCS user using a Multimedia PC client, Web client, Nortel IP Phone 2002 or 2004, and Multimedia PC Client Set.

Viewing and modifying your Watchers List

To see a list of people who have subscribed to your presence information

1 Click the **Preferences>Services>Presence>Watchers** submenu item. The Watchers List page appears.

The list shows only the active usernames watching your presence, not all users registered to your presence. The date when an active watcher subscribed to your presence information is also displayed.

2 To ban an active watcher from seeing your presence information

a Click the checkbox beside the watcher's username.

b Click the **Ban watchers** icon. The Banned watchers list appears with the new banned watcher's username.

Setting up a Banned watcher's list

You want to ban someone from subscribing to your presence information in the future. Use the **Banned watchers** menu option to restrict access by other users who do not currently appear in your watcher's list.

To ban someone from viewing your presence information

1 Click the **Preferences>Services>Presence>Watch List** submenu item. The Watch List page appears.

2 Enter the SIP address of the person you want to ban.

3 Click **Save**. The person you added to the Watch List can still call you, but they can no longer see your online status. The name now appears in a list of banned users.

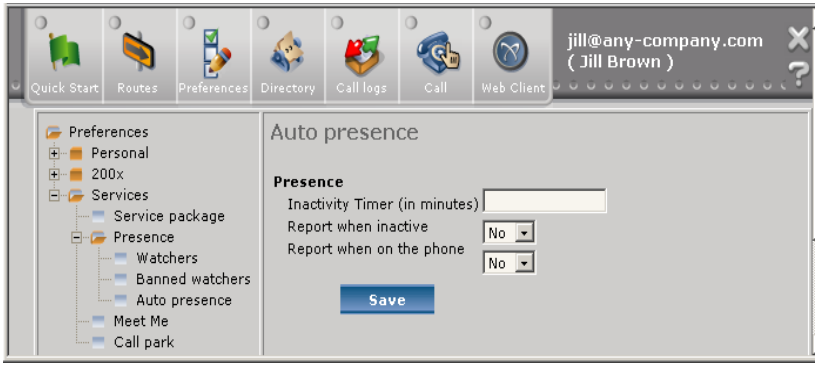
4 To delete a user from your Watch List, click the link, **Delete**, next to Banned User. Click **OK** at the confirmation message. The party is removed from the ban list.

Modifying your Automatic presence service

If you have the Automatic presence service enabled in your service package, you can automatically let other users in your domain know whether you are away from your PC or on the phone.

To modify your Automatic presence options

1 Click the **Preferences>Services>Presence>Auto presence** submenu item. The Auto presence page appears.



2 Select the **Report when inactive** option, and enter a time value in the range of 10 to 600 minutes into the **Inactivity Timer (in minutes)** field. This value is the number of minutes that must elapse before your status is reported as inactive. People who have subscribed to your presence will be alerted to your presence status after the elapsed time.

Note: The Inactivity Timer (in minutes) option only applies to the MCS client, which includes the Multimedia PC Client and the Multimedia Web Client. This option does not apply to the Nortel IP Phones 2002 and 2004.

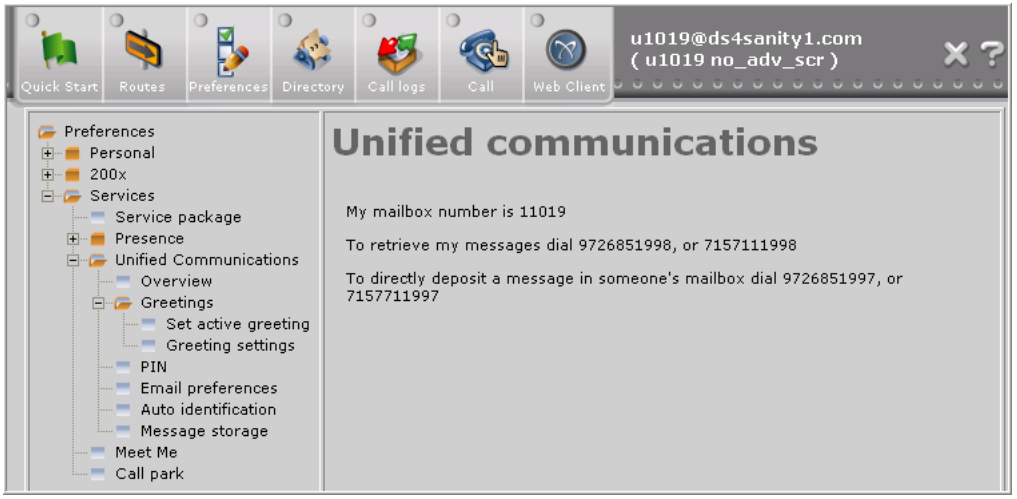
3 Select the **Report when on the phone** option to allow people subscribed to your presence to receive an “On the Phone” message that appears when you are connected on a call. This option applies to all the clients: Multimedia PC Client, the Multimedia Web Client, and the Nortel IP Phones 2002 and 2004.

4 Click **Save**. Any changes to your service package are reflected the next time you log in.

Viewing and modifying your Unified Communications details

The Unified Communications service provides you with integrated access to your voice-mail messages from a preferred client device, such as a PC, voice over IP (VoIP) phone, wireless phone, or a traditional circuit switched telephone. You use the Personal Agent to view and modify the details of your account.

Click the **Preferences>Services>Unified Communications>Overview** submenu option to display your mailbox number and the access numbers for the Unified Communications service. The Unified communications page appears.



Setting your greeting message

To select which recorded greeting is played when a user leaves you a message

1 Click the **Preferences>Services>Unified Communications>Greetings>Set Active Greetings** submenu option. The Unified Communications: Greetings page appears.

2 Select (from the drop down list) which recorded greeting is played when a user leaves you a message:

- System
- Temporary
- Personal
- Custom (up to 3 custom greetings)

3 When complete, click **Save** to save your changes. If you make changes and decide not to save them, click **Reset**. When you do, the page is refreshed to the original information.

Modifying your current greeting settings

To modify your greeting settings

1 Click the **Preferences>Services>Unified Communications>Greetings>Greeting settings** submenu option. The Unified Communications: Greetings page appears.

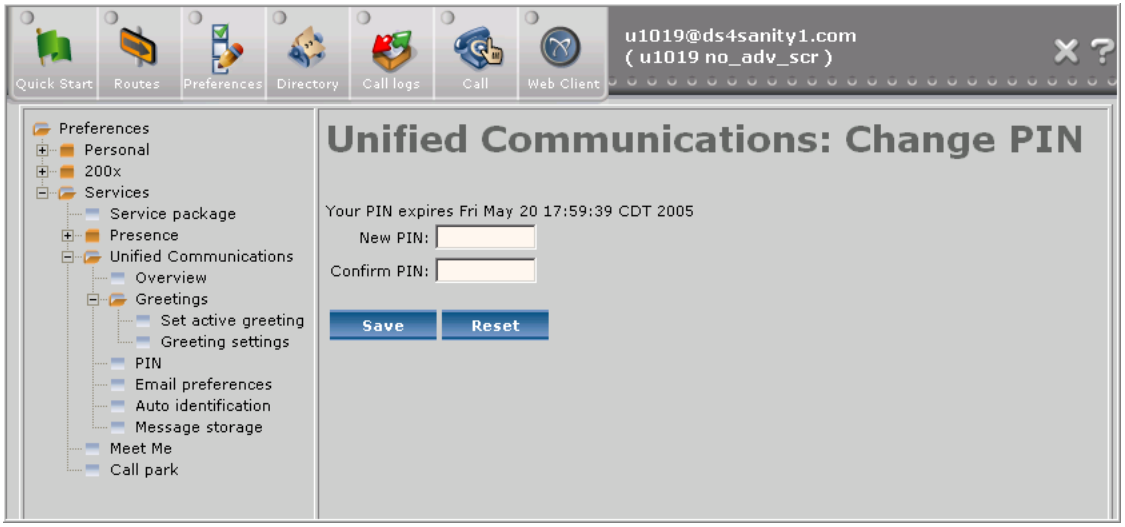
2 For each greeting, click the Modify link to specify a different email address to deliver your voicemail message to and to assign transfer destinations.

3 When complete, click **Save** to save your changes. If you make changes and decide not to save them, click **Reset**. When you do, the page is refreshed to the original information.

Changing your PIN

To change your Personal Identification Number (PIN)

1. Click the **Preferences>Services>Unified Communications>Greetings>PIN** submenu option. The Unified Communications: Change PIN page appears.

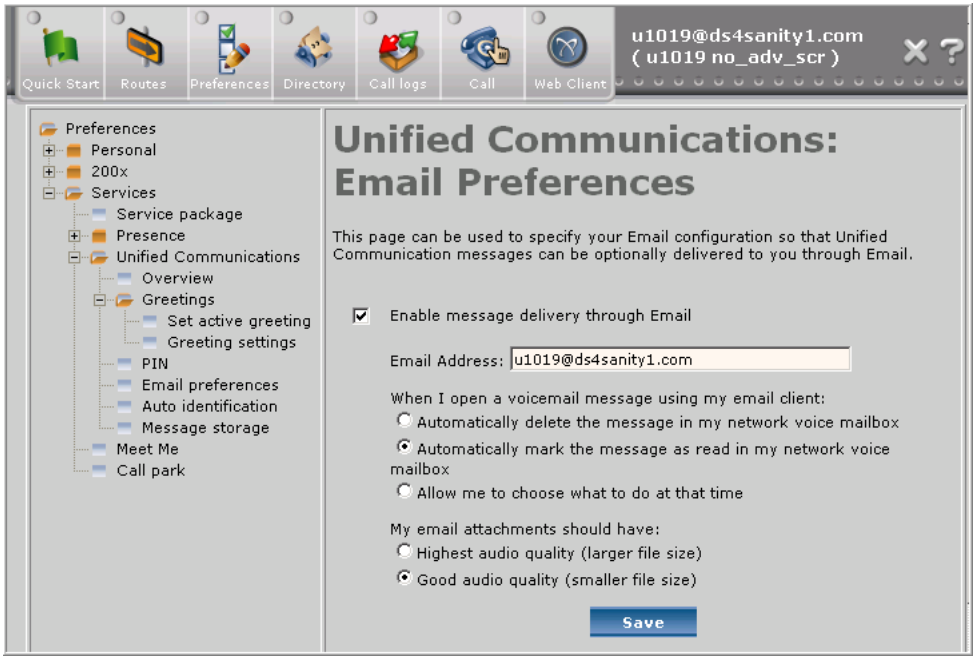


2. Enter a new PIN for accessing your mailbox.
3. Enter the new PIN again in the Confirm PIN box.
4. When complete, click **Save** to save your changes. If you make changes and decide not to save them, click **Reset**. When you do, the page is refreshed to the original information.

Setting your email preferences

To change the email delivery options of your voicemail messages

1 Click the **Preferences>Services>Unified Communications>Greetings>Email preferences** submenu option. The Unified Communications: Email Preferences page appears.



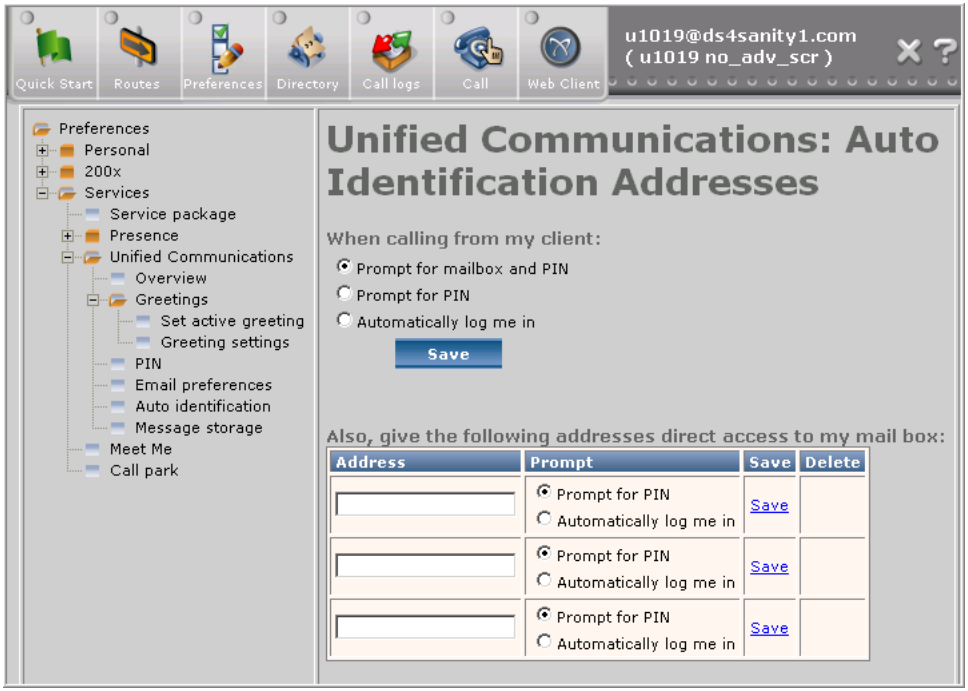
2 Modify the email delivery options of your voicemail messages.

3 Click **Save** to save your changes.

Controlling your automatic login

To control your Unified Communications login when using other PSTN telephony devices (such as a cell phone) that are not hosted by the MCS network

1 Click the **Preferences>Services>Unified Communications>Greetings>Auto Identification** submenu option. The Unified Communications: Auto Identification Addresses page appears.



2 Select a an option to use automatic identification when calling from your client and click **Save**.

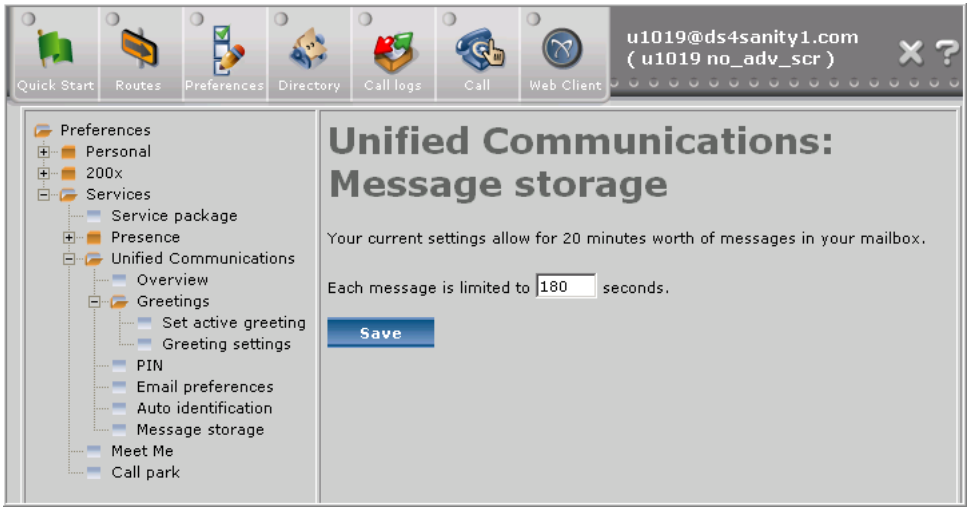
3 Provide direct access to your mailbox by using the customize option to enter up to three different PSTN or ESN numbers. Click **Save** to save your changes.

Note: The customize option only allows you to enter valid PSTN or ESN digits and not a user name. Only PSTN numbers not hosted by the MCS network can be used for automatic identification. For example, automatic identification does not work when subscribers call from a known device, such as the cell phone or home phone. The numbers listed in the Aliases field in **Preferences > Personal >Contact Info** will not work. You would list a user's PSTN number as an Alias number for that user, so you would not enter that number as an address to be auto identified. Instead, you would use auto identification for the "my client" the user is logged in as.

Setting recording time for incoming voicemail messages

To set the maximum recording time for incoming voicemail messages

1 Click the **Preferences>Services>Unified Communications>Greetings>Message Storage** submenu option. The Unified Communications: Message storage page appears.



2 Set the maximum length (in seconds) for an incoming voicemail message.

3 Click **Save** to save your changes.

Viewing and modifying your Meet Me conferencing details

The Meet Me audio conferencing service allows you to have a personal conference bridge, available 24 hours a day. Use of the bridge is strictly enforced through a PIN access. Participants dialing into the bridge are greeted and prompted to enter in an Access Code that uniquely identifies a personal bridge. Only you, as the chairperson (the person who owns the bridge), can open the bridge and allow all participants to join.

To view the details of your bridge

1 Click the **Preferences>Services>Meet Me** submenu option. The Meet Me page appears.

2 View the specific details of your conference information including

- Dial-In Number
- Access Code
- Collaboration URL (static) used by participants to join a future or current web collaboration conference. This URL is provided to participants that may be calling in from a location where they do not have access to the Multimedia PC Client or Multimedia Web Client (but do have access to a web browser).
- URL (dynamic) for the Chairperson's web collaboration access (appears once the collaboration session is activated). This URL is provided to participants who are using a non-multimedia phone set to start the conference, but are using a PC with a browser to participate in the conference.

For more information on using the MCS Web Collaboration Service, see the *MCS Feature Description Guide*.

Note: Contact your service provider or system administrator to request any changes to the conference phone number(s), conference access code, or static conference URL.

- Chairperson PIN. To change the Chairperson PIN, enter a number between 4 and 10 digits long.
- A checkbox to indicate whether or not the conference will end when you disconnect from the call.
- A checkbox to indicate whether or not to receive instant messages (such as attendance roster and collaboration material access) during the time when you are the chairperson.
- A checkbox to allow interactive particulates audio emoticons. (Your system administrator is responsible for providing the media source files for the audio emoticons.)
- Radio buttons to select audio entry/exit tone indicators to announce the arrival and departure of conference participants.

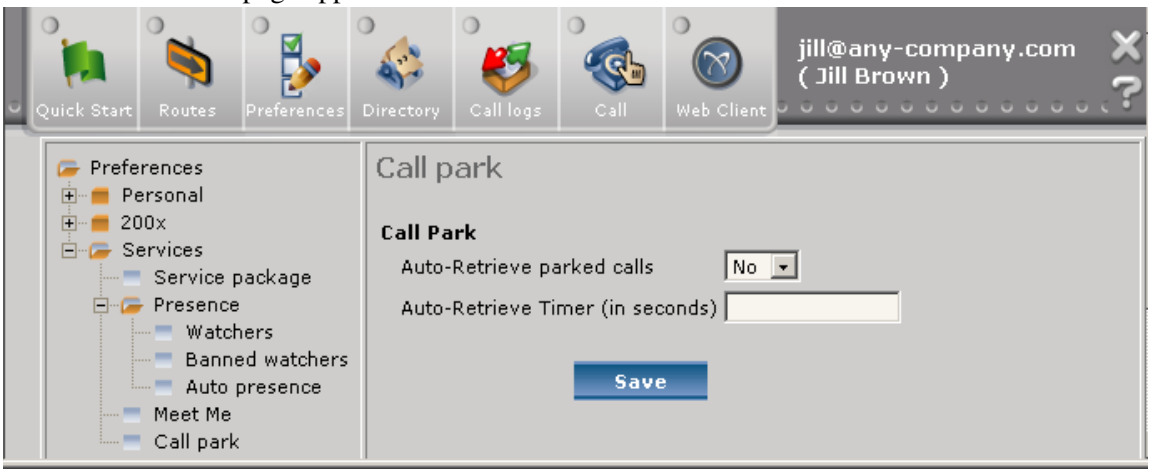
3 Click **Save** to save your changes. If you make changes and decide not to save them, click **Reset**. When you do, the page is refreshed to the original information.

Modifying your call park

Call park allows you to place a call on hold so that someone else can retrieve it. You can have the call returned to you if it is not picked up after a specified amount of time. For information on how to use the call park feature, refer to the user guide for your device. This service must be enabled in your service package.

To change your call park settings

1 Click the **Preferences>Services>Call park** submenu option. The Call Park page appears.



2 Select **Yes** or **No** from the Auto-Retrieve parked calls drop down menu.

3 Enter the amount of time (in seconds) that must elapse before a call is auto retrieved.

Note: This step is not required if you chose not to auto-retrieve calls in step 2.

4 Click **Save**.

Setting Calling Line Identification

Calling Line Identification allows you to specify whether or not you want your name and number to appear when you call someone. This service must be enabled in your service package.

To change your Calling Line ID Restriction setting

1 Click the **Preferences>Services>Calling Line ID Restriction** submenu option. The Calling Line ID Restriction page appears.

2 Select **Yes** or **No** from the Calling Name/Number Privacy drop down menu.

Note: If you enable this service, then your calling ID information appears as either "unknown" or "anonymous."

Chapter 3
Creating and maintaining your directories

The **Directory** icon is available from the Personal Agent Quick Start landing or top navigation menu. It allows you to

- create and maintain a personal address book of your personal contacts and groups of contacts.
- access a global address book of all users in your domain (if enabled in your system).
- call a contact from your personal or global address book.
- access details about a contact including their presence status on the system.

Topics in this section include

- "Understanding Personal Agent address books" on page 57
- "Using your personal address book" on page 58
- "Managing your contacts in your personal address book" on page 68
- "Using the global address book" on page 77

Note: If your system administrator has disabled the global address book for your domain, you will not see the option to select the global address book in the SEARCH dropdown menu.

Understanding Personal Agent address books

The following address books are available in the Personal Agent:

- personal address book - contains contact information set up by you.

- global address book (if enabled in your system) - contains contact information (maintained by your system administrator and for reference only) of all users in your domain.

Tip: Information in your personal and global (if enabled) address book can be used as a condition when defining a route to handle your incoming calls. For more information, refer to Chapter 6, "Using the Personal Agent Route Wizard," on page 107.

Using your personal address book

Your personal address book is a dynamic list of contacts and information that lists the nickname, first name, and last name of a contact in your personal address book. You can also view and define a group for the contact to belong to and whether or not to include the contact in your list of Friends.

Tip: Anytime you add a contact or make a change to a contact using the Personal Agent, your personal address book automatically updates and synchronizes with the Multimedia PC Client, Multimedia Web Client, Nortel IP Phones 2002 and 2004, enabling you to view your Friends on line from any of these devices.

Your personal address book has two viewing options for your contacts:

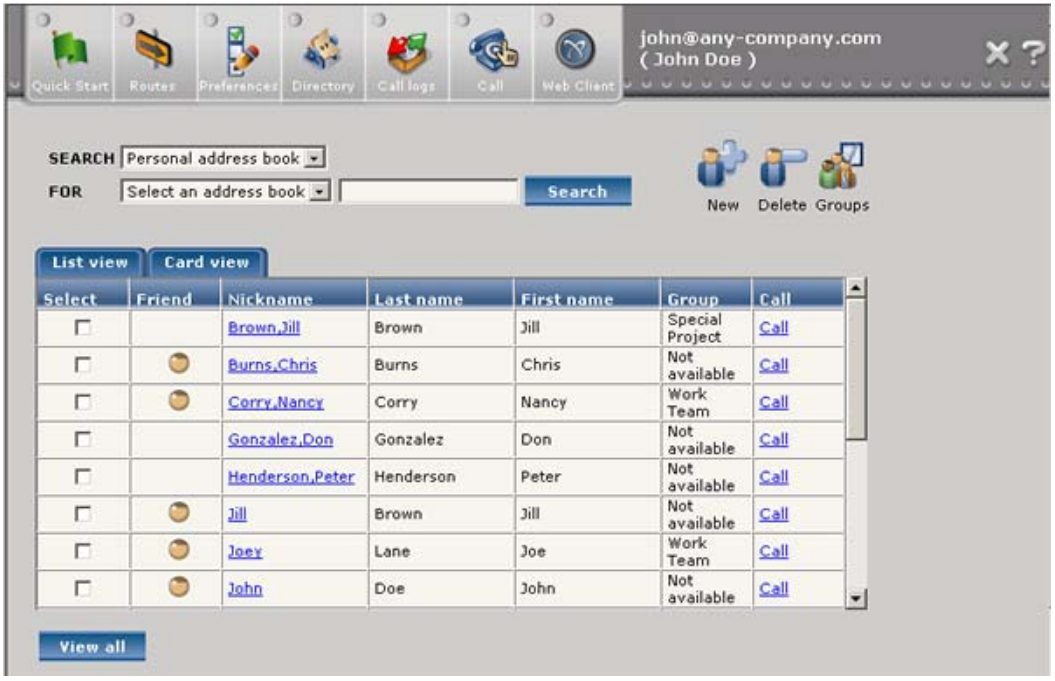
- List view -- a traditional "table-like" view
- Card view -- information as you would normally see on a business card (including a picture of the contact, if available)

Both the List view and Card view have the following icons available for working with your personal address book.

Click this icon...	**To...**
	add a new contact to your personal address book.
	remove selected contacts from your personal address book.
	create, rename, and delete contact groups in your personal address book.

Viewing your contacts in List view

To view your personal address book contacts in List view, click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.



Tip: The **List View** tab is always the active view when you access your directory. Your personal address book appears in a list format, allowing you to scroll up and down to view all the contacts in the list.

Sorting your contacts

To sort your contacts, click a column name (for example, **Friend**, **Nickname**, **Last name**, **First name**, or **Group**). Click the column name again to sort in reverse.

Note: You may have to sort users each time you open the global address book.

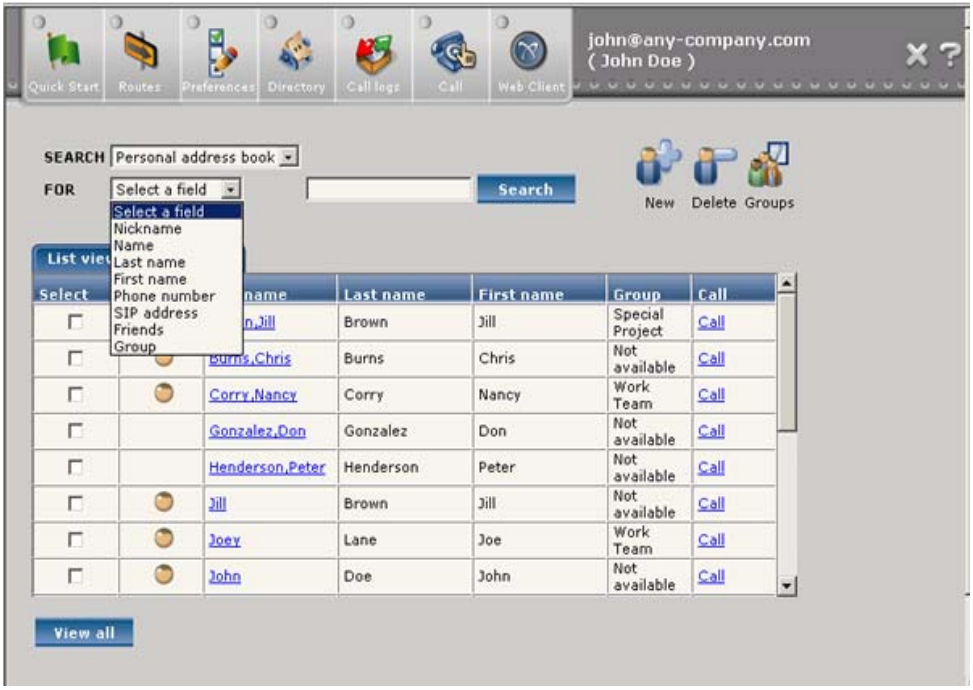
Searching for a contact

To search for a contact

1. Select Personal address book from the drop-down menu list next to the **SEARCH** field.
2. Select a field to search on as described in the following table.

Field	Search criteria
Nickname	An alternate name assigned to a subscriber. For example, you may assign the nickname “manager” for the person you work for.
Name	• First name and last name of the contact. For example, searching for the contact with the Name of Smith displays contacts with the first name Smith and contacts with the last name Smith. • Both first and last name of the contact. For example, the string John Smith returns contacts with the first name John and the last name Smith.The search string Smith, John, also returns the same contacts. • Name matching continuation. For example, entering a **y** returns all contacts starting with the letter **Y**.
Last name	Last name of the contact
First name	First name of the contact
Phone number	Telephone number of the contact
SIP address	The SIP address of the contact on the IP network. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address.
Friends	Nickname, first name, or last name of the contact
Group	Group name that the contact is a member of. For example, searching for Work returns all contacts that are members of that group.

3 Enter a search string in the field provided and click **Search.**



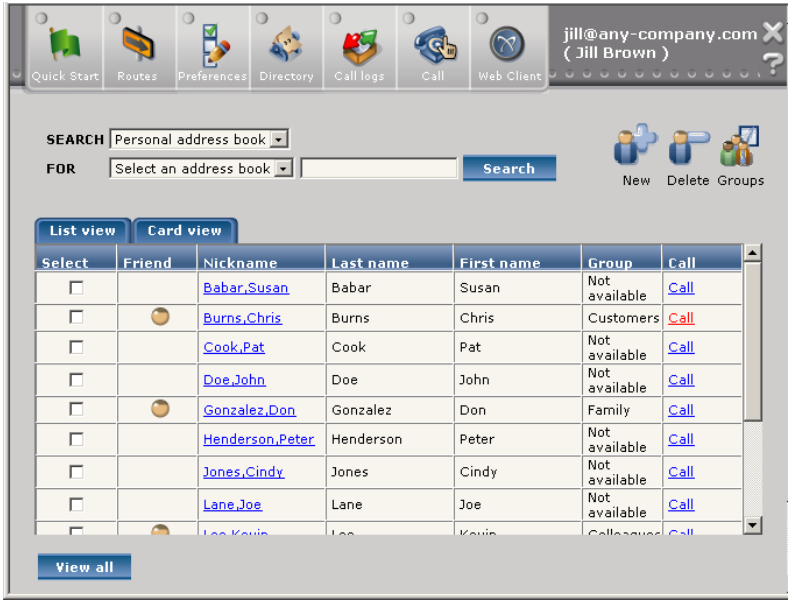
Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen, and so on. Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria refer to Appendix A, “Understanding Address Book Search Criteria,” on page 133.

Viewing details about a contact

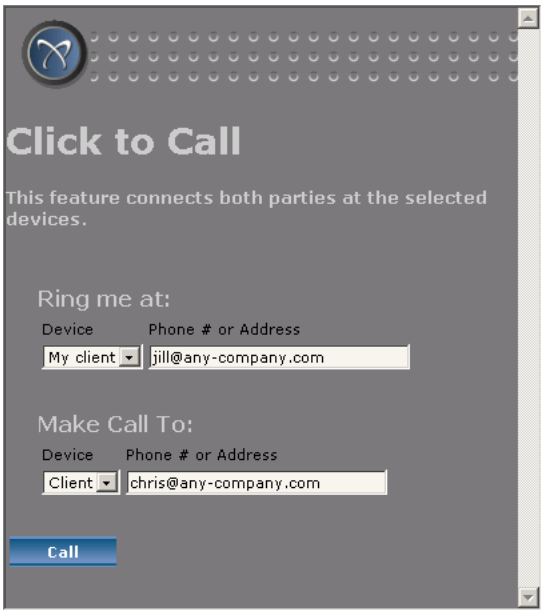
To view details about a contact, click a link in the **Nickname** column. A page appears listing details about the contact, including an icon that indicates their presence status on the network. You can click the **Back** button to return to the contact list.

Initiating a call to a personal address book contact

To call a contact, click the **Call** link in the **Call** column to initiate a call to the contact in your personal address book.



The Click to Call page appears. See Chapter 5, “Using Click to call to make calls,” on page 97, for complete information on using Click to call.



Viewing your contacts

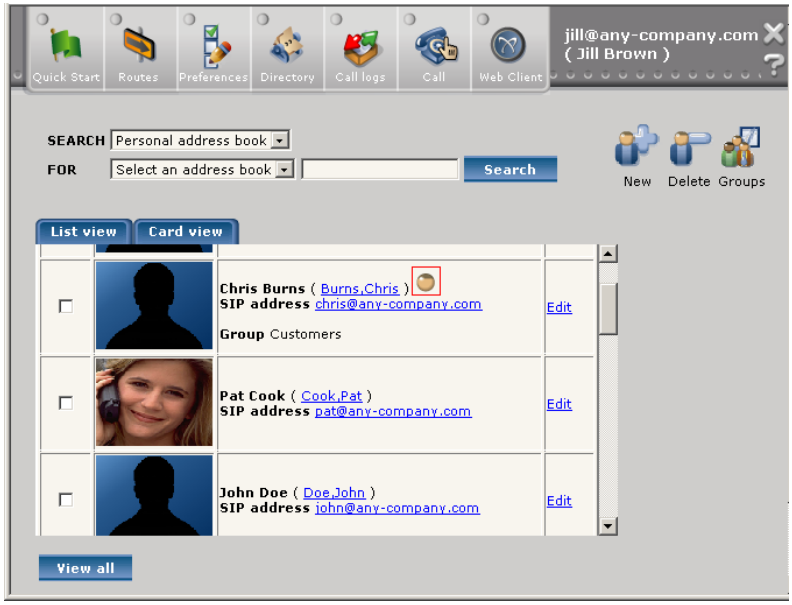
To expand the list of contacts to display all the contacts in your personal address book, click **View All**.

Viewing your contacts in Card view

To view your personal address book contacts in Card view

1 Click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.

2 Select the **Card View** tab. Your personal address book appears in a Card view. Scroll up and down to view all the contacts in the Card view.



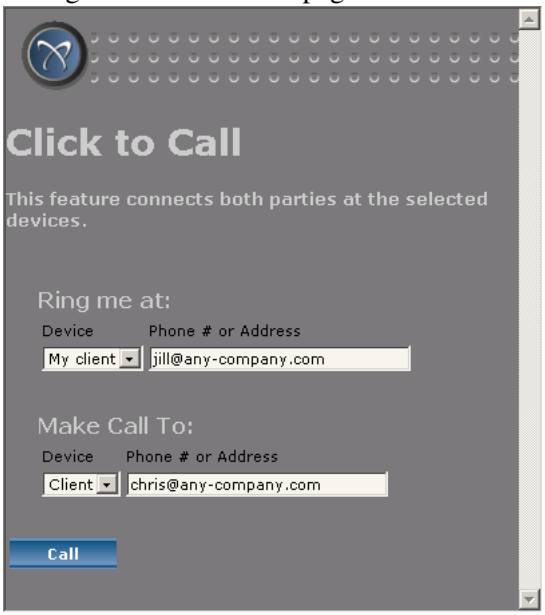
Tip: A shadow figure in the Picture column means that there is no picture ID available for the contact.

Viewing details about a contact

To view details or to initiate a call to a contact, click the following links in the **Details** column:

- **Name** - click to edit contact details. The contact details page appears and includes details, such as the presence status of the contact on the network. Click **Edit** to edit contact details or **Back** to return to the list of contacts in Card view.

- **SIP address**, **Business phone**, **Home phone**, **Mobile** - click to initiate a call through the Click to Call page.



See Chapter 5, "Using Click to call to make calls," on page 97, for complete information on using Click to call.

Managing your contacts in your personal address book

Your personal address book helps you manage, track, and access information about all of your key contacts.

Adding a contact to your personal address book

Note: The maximum number of contacts that you can add to your personal address book is dependent on your Service Package.

To add a contact to your personal address book

1 Click the **New** icon on the Personal Address book page. The Add new entry page appears.

2 Complete the fields with your contact's personal information. Required fields are indicated with an asterisk (*).

Tip: MCS supports the + (plus) format as an international number designator when placed in the first position of a Directory Number (DN) or alias.

3 Click in the checkbox next to the **Friend** icon to designate a personal address book contact as one of your Friends.

4 Select a group for the contact using the Group drop-down list.

5 Click **Save** to save this contact to your personal address book and close the window, or **Cancel** to return to your personal address book.

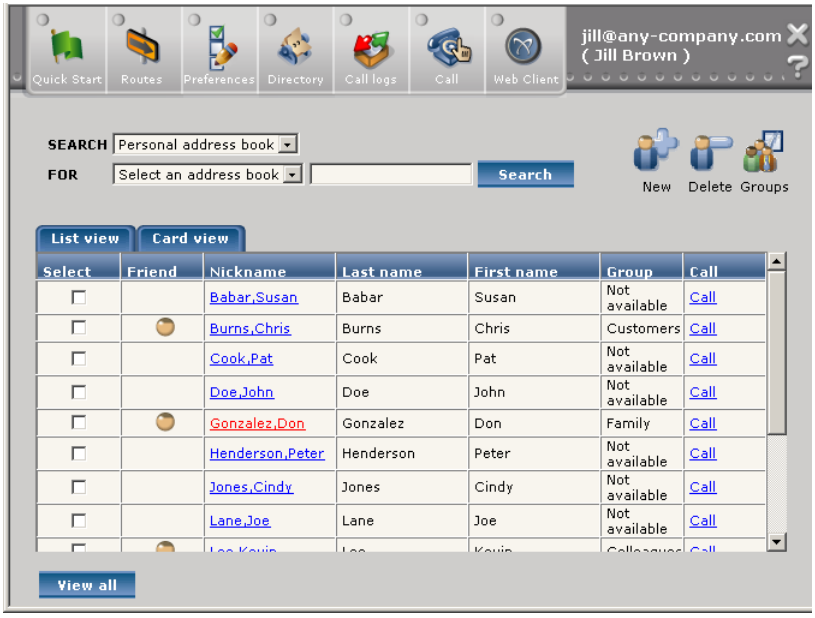
Editing a contact

There may be times when you wish to modify information about a contact in your address book.

Editing a contact - List view

To edit details about a contact (List view) in your personal address book

1 Select and click the contact that you want to edit from the List View.



2 On the contact details page that appears, click **Edit.**

3 Enter or revise the contact information, including Friend or Group selections.

Note: As a Converged desktop user, when you create a new route, you must ensure that the entire contact information is populated in the contact details window. You must especially ensure that the preferred audio device (PAD) number is populated in the window. The PAD number is usually your business phone number, but it could also be your home phone or mobile number.

4 Click **Save** to save the changes, **Delete** to delete the contact, **Copy** to copy the information, or **Cancel** to return to the previous screen.

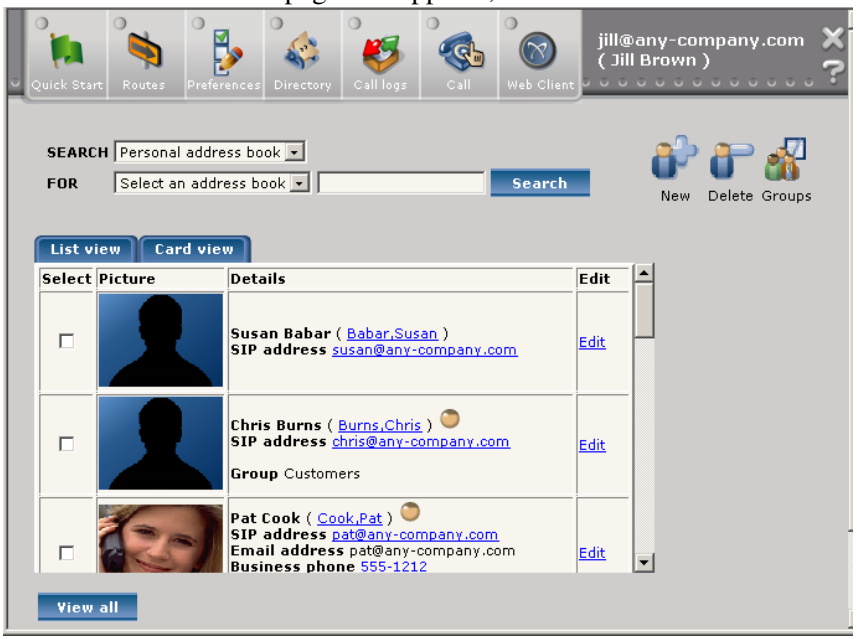
5 Click **Back** to return to your personal address book.

Editing a contact - Card view

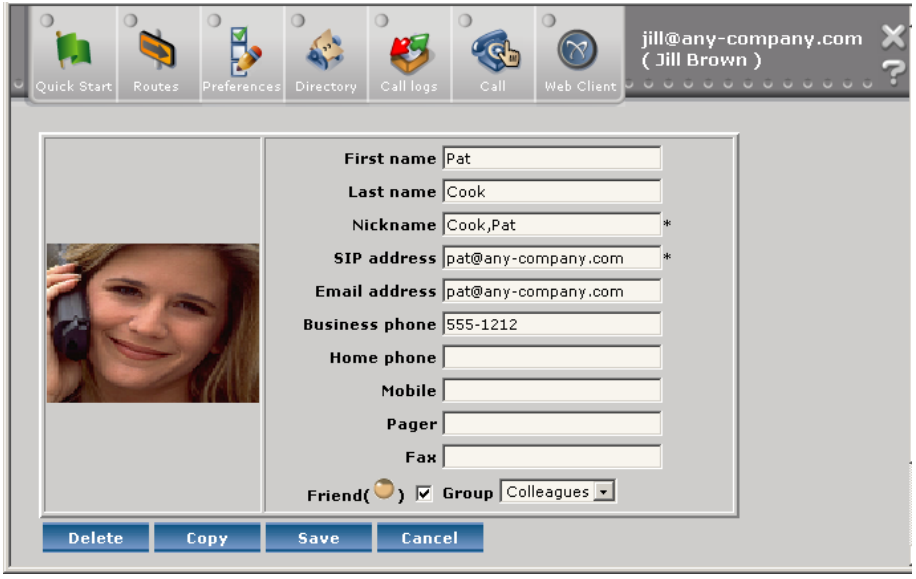
To edit details about a contact (Card view) in your personal address book

1 Select the contact that you want to edit from Card view.

2 On the contact details page that appears, click Edit in the Edit column.



3 Enter or revise the contact information, including Friend or Group selections.



4 Click **Save** to save the changes, **Delete** to delete the contact, **Copy** to copy the information, or **Cancel** to return to the previous screen.

5 Click **Back** to return to your personal address book.

Deleting a contact

To select a contact (or a number of contacts) to delete

1 Enter a checkmark in the checkbox in the **Select** column next to the contact (or number of contacts) you wish to delete.

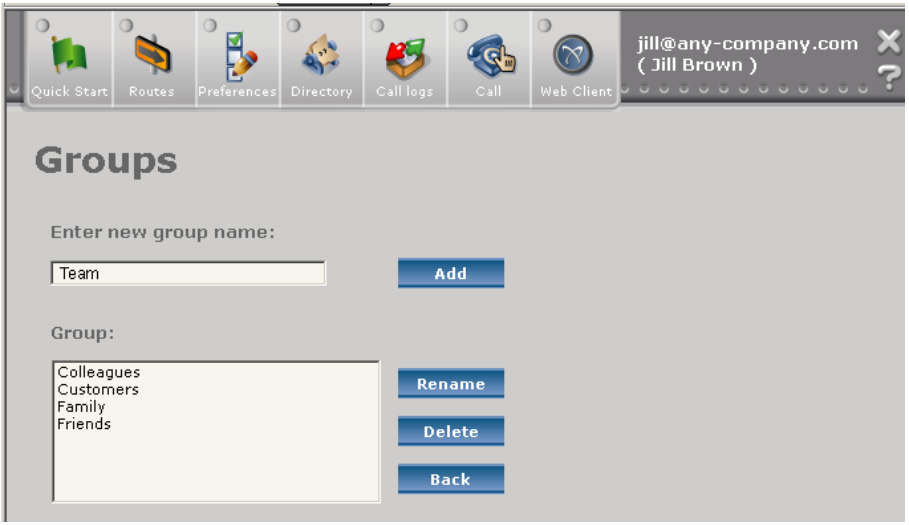
2 Click the **Delete** icon on the personal address book page.

3 Click **OK** when you are prompted to confirm the deletion. The contact is deleted from your personal address book that is dynamically synchronized with the Multimedia Web Client, the Multimedia PC Client, and the Nortel IP Phones 2002 and 2004.

Adding a new group

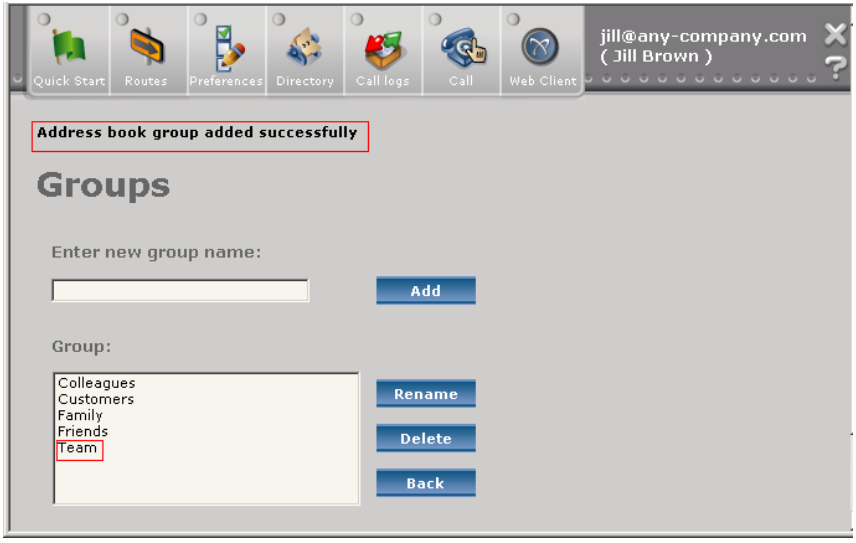
Before you begin adding contacts to your personal address book, you will want to create a group for the contact to belong to. For example, you can create a group called “Work” for your office contacts, another called “Personal” for your personal contacts in another, and so on. To add a new group

1 From the personal address book, click the **Groups** icon. The Groups page appears.



2 Enter the name of the Group. For example, you can group all the members of your family into a group called “Family”.

3 Click **Add**. The message “Address book group added successfully” appears at the top of the Groups screen. The new group now appears in the Groups window.



4 Click **Add** to add more groups. To rename a group, select the group in the Groups window and click **Rename.** To delete a group, select the group and click **Delete**.

5 Click **Back** to return to your personal address book.

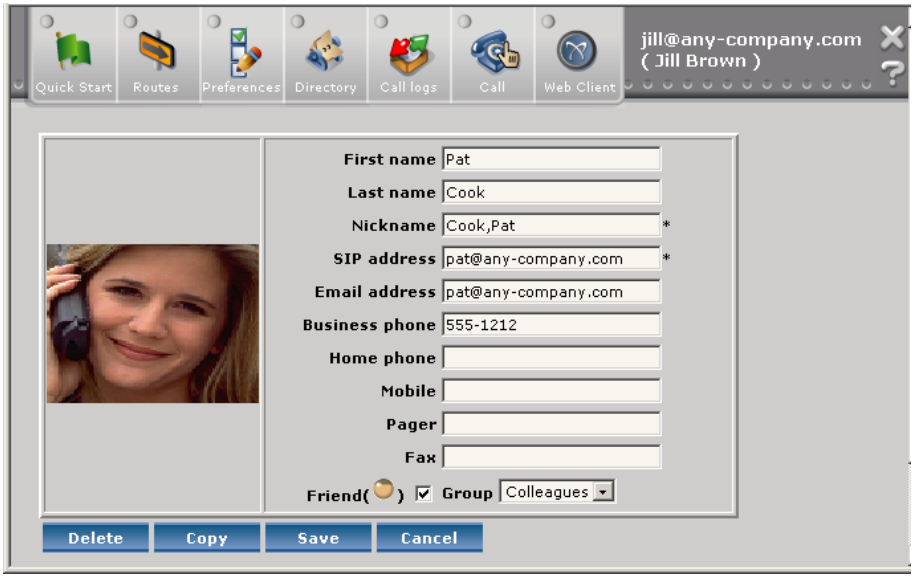
Designating a contact as a Friend

Note: Presence must be enabled in your service package to be able to select the Friend check box for designating a contact as a Friend in your personal address book. Your service package determines the maximum number of contacts that you can designate as Friends. By designating a contact as a Friend, you are able to view their activity by clicking the **Friends Online** icon in the Multimedia PC Client or the Multimedia Web Client. For more information, refer to the *MCS Client User Guide*.

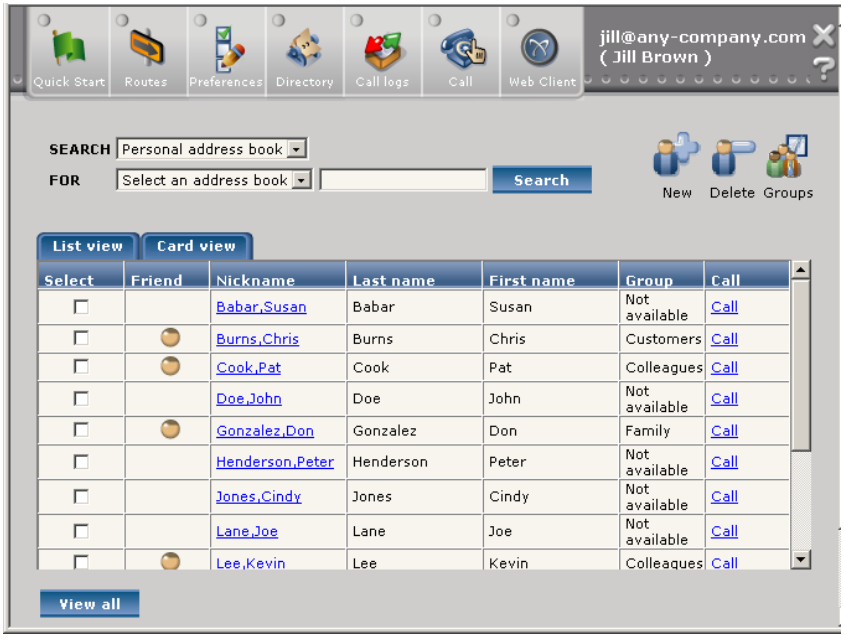
The Personal Agent allows you to create, view, and update a contact as a Friend. Friends may be people that you work with or correspond with regularly.

To designate a contact as a Friend

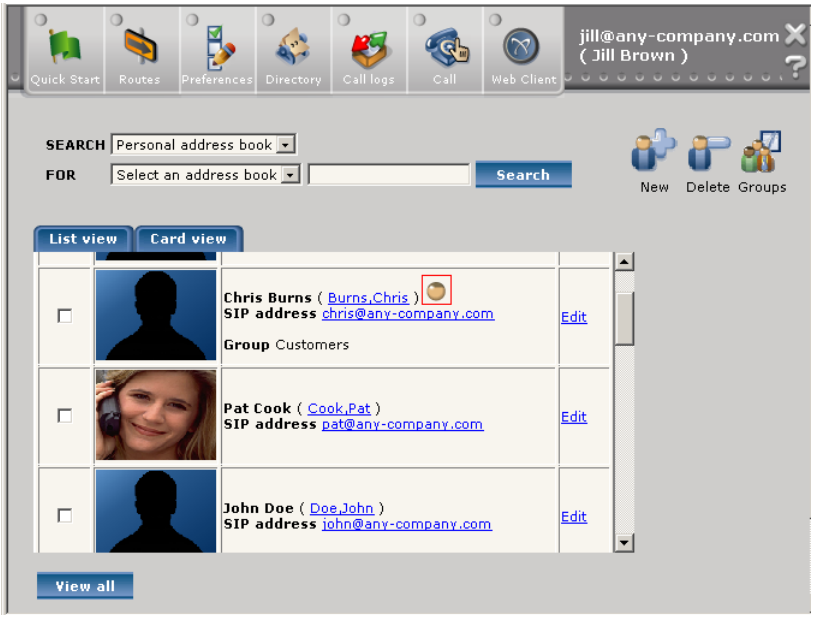
1 Click on the checkbox next to the **Friend** icon when entering or completing contact information in your personal address book (Card view or List view).



2 Click **Save**. The contact you designated as a Friend now appears in your personal address book (List view) with the **Friend** icon appearing in the Friends column for the selected contact.



In Card view, the contact you designated as a Friend appears with the **Friend** icon next to the contact name.



3 To delete a contact as a Friend, uncheck the checkmark next to the **Friend** icon in the contact details page (List view or Card view) and click **Save.**

Tip: You can also use the Multimedia PC Client, Multimedia Web Client, Nortel IP Phone 2002, or Nortel IP Phone 2004 to see whether or not a Friend is online.

Using the global address book

Note: If your system administrator has disabled the global address book for your domain, you will not see the option to select the global address book in the SEARCH dropdown menu.

Your global address book is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

Your global address book has two viewing options for your contacts:

- List view -- a traditional “table-like” view
- Card view -- information as you would normally see on a business card (including a picture of the contact, if available)

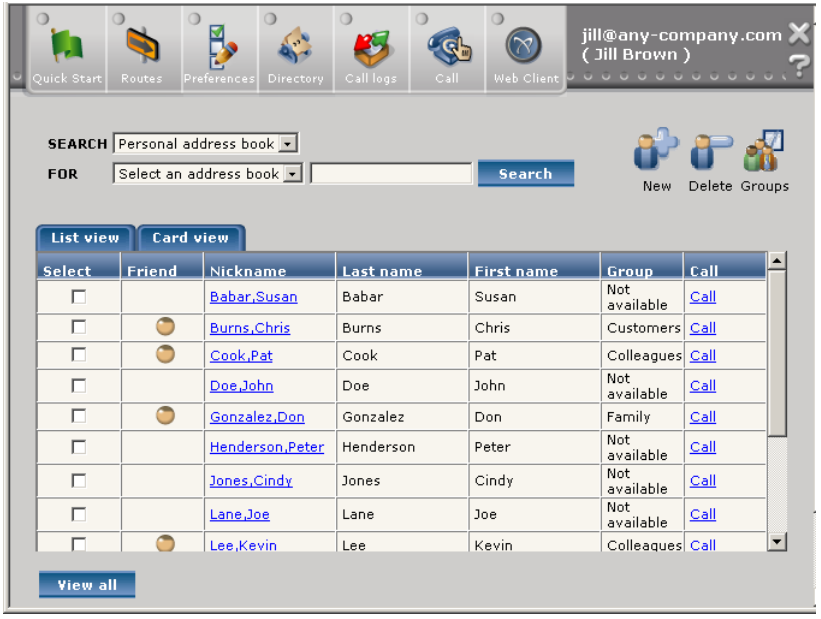
Note: If the global address book is unavailable, please contact your system administrator.

Accessing the global address book

To access the global address book (if enabled)

1 Click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.

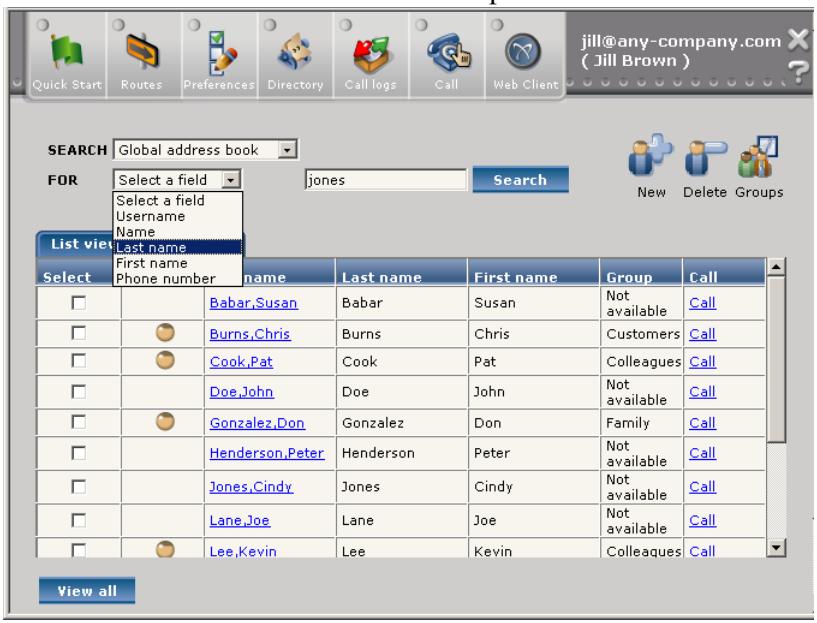
Note: By default, the active book is always your personal address book in List view format.



2 To display users from the global address book

a Select Global address book from the drop-down list next to the **SEARCH** field.

b Select a field to search **FOR** from the drop-down list.



c Enter a search string in the text box as described in the following table.

Note: If the search string you enter is too broad, you may receive the following message "User search will return too many entries. Please refine your search criteria". In this case, modify the criteria in the text box to narrow down your search so that your search results will display.

For a complete list of the search criteria you can specify to search for a contact, see "Global Address Book search criteria" on page 136.

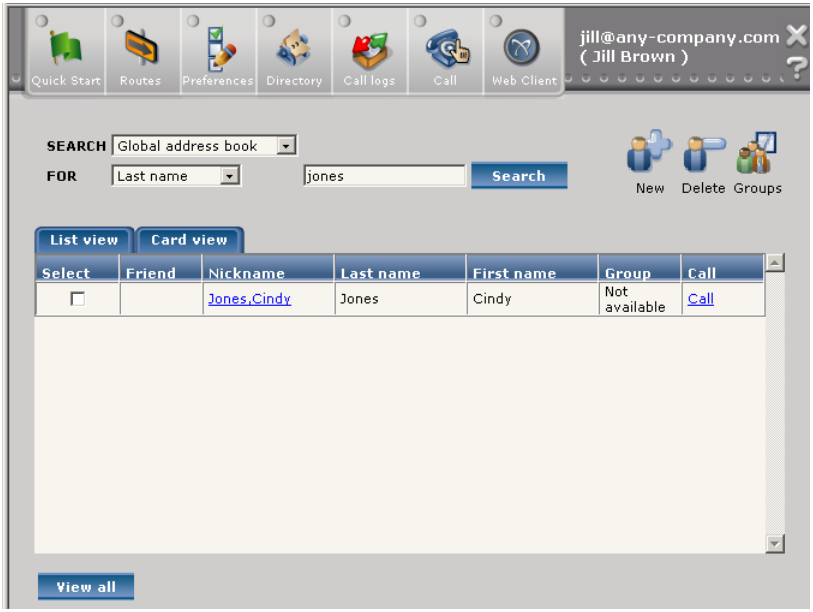
Field	Search criteria
Username	Username of the user (assigned by your service provider or system administrator), for example, eburns.

Name	• First name and last name of the user. For example, searching for a user with the Name of Smith will display users with the first name Smith and contacts with the last name Smith. • Both first and last name. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example entering a **y** returns all users starting with the letter **Y**.
Last name	Last name
First name	First name
Phone number	Telephone number

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen, and so on.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria, refer to Appendix A, “Understanding Address Book Search Criteria,” on page 133.

d Click **Search**. The global address book appears, in List view, with the results of the user search specified.



3 To return to your personal address book, click **Return to my address book**.

Working with the global address book - List view

The global address book (if enabled) allows you to access a single, common, network-wide address book, in a list format.

Sorting users

To sort users in the global address book (if enabled)

1 Click a column name (for example, **Last name, First name**, **Office**, or **Home**).

2 Click the column name again to sort in reverse.

Note: You may have to sort users each time you open the global address book.

Searching for a user

To search for a user in the global address book (if enabled) in List view

1. Select Global address book from the drop down list next to the **SEARCH** field.
2. Select a field to search on as described in the following table.

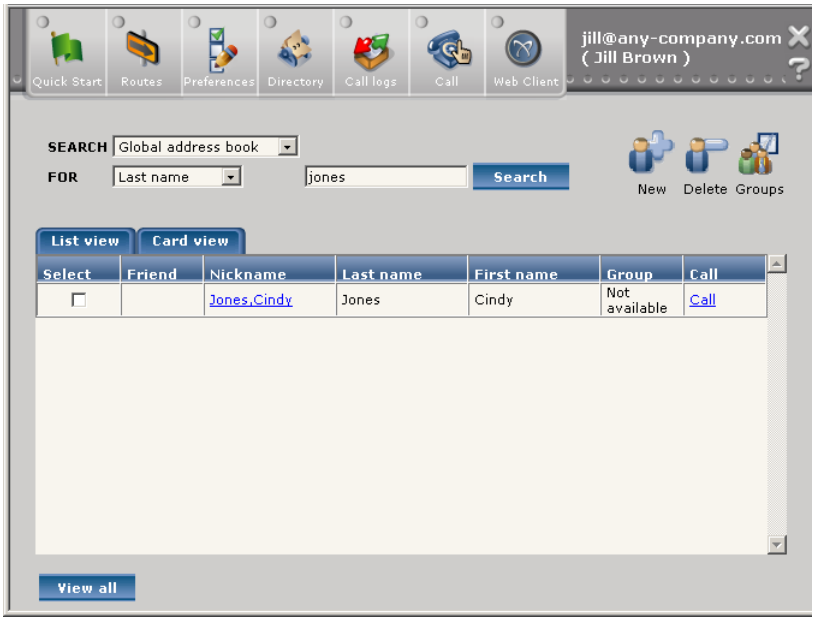
Field	Search criteria
Username	Username of the user (provisioned by your service provider or system administrator), for example, eburns.
Name	• First name and last name of the user. For example, searching for a user with the Name of Smith will display users with the first name Smith and users with the last name Smith. • Both first and last name of the user. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example, entering a **y** returns all users starting with the letter **Y**.
Last name	Last name of the user
First name	First name of the user
Phone number	Telephone number of the user

3. Enter your search criteria.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen, and so on.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria, refer to Appendix A, “Understanding Address Book Search Criteria,” on page 133.

4 Click **Search**. The results of your search appears.



5 Click **Return to my address book** to access your personal address book.

Viewing details about a user

To view details about a user in the global address book (if enabled)

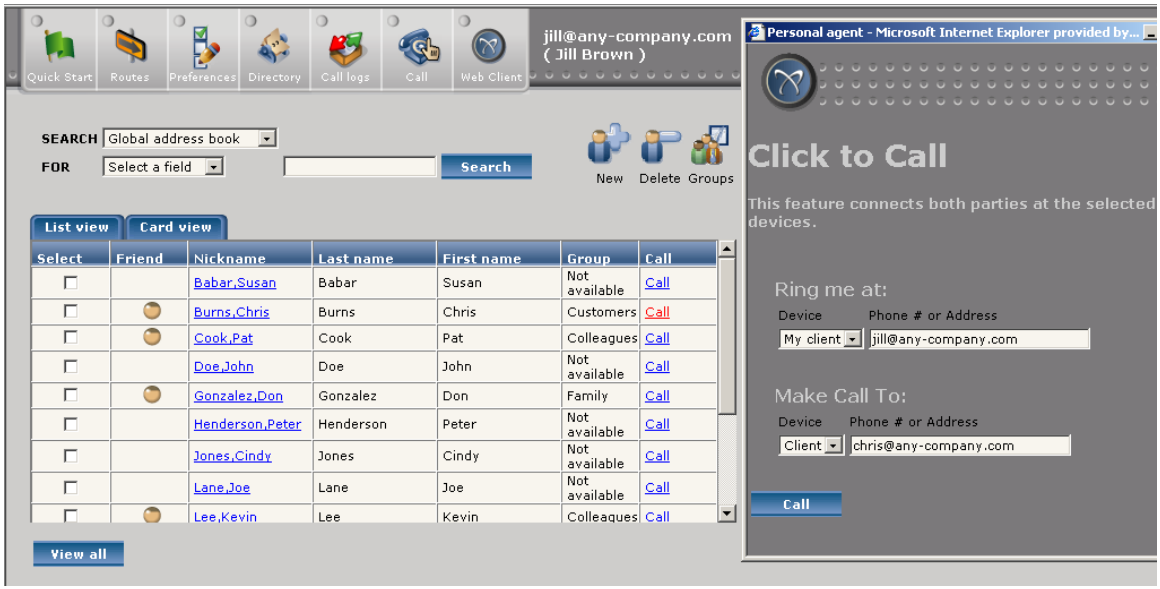
1. Click on a highlighted user in the **Last name**, **First name**, **Office**, or **Home** column. A page appears listing details about the user, including an icon that indicates their presence status on the network.

2. Click **Close** to return to the global address book page, or click **Add** to add this user to your personal address book.

Initiating a call to a global address book user

To initiate a call to a user in the global address book (if enabled)

1 Click the **Call** link in the **Call** column to initiate a call to the user in your global address book. The Click to Call window pops up; simply click the **Call** button to connect.



2 For information on how to use Click to call, see Chapter 5, “Using Click to call to make calls,” on page 97.

Working with the global address book - Card view

To access the global address book (if enabled) in Card view

1 Select Global address book from the drop-down list next to the **SEARCH** field.

2 Select a field to search on as described in the following table.

Field	Search criteria
Username	Username of the user (provisioned by your service provider or system administrator), for example, eburns.
Name	• First name and last name of the user. For example, searching for the user with the Name of Smith will display users with the first name Smith and users with the last name Smith. • Both first and last name of the user. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example, entering a **y** returns all users starting with the letter **Y**.
Last name	Last name of the user
First name	First name of the user
Phone number	Telephone number of the user

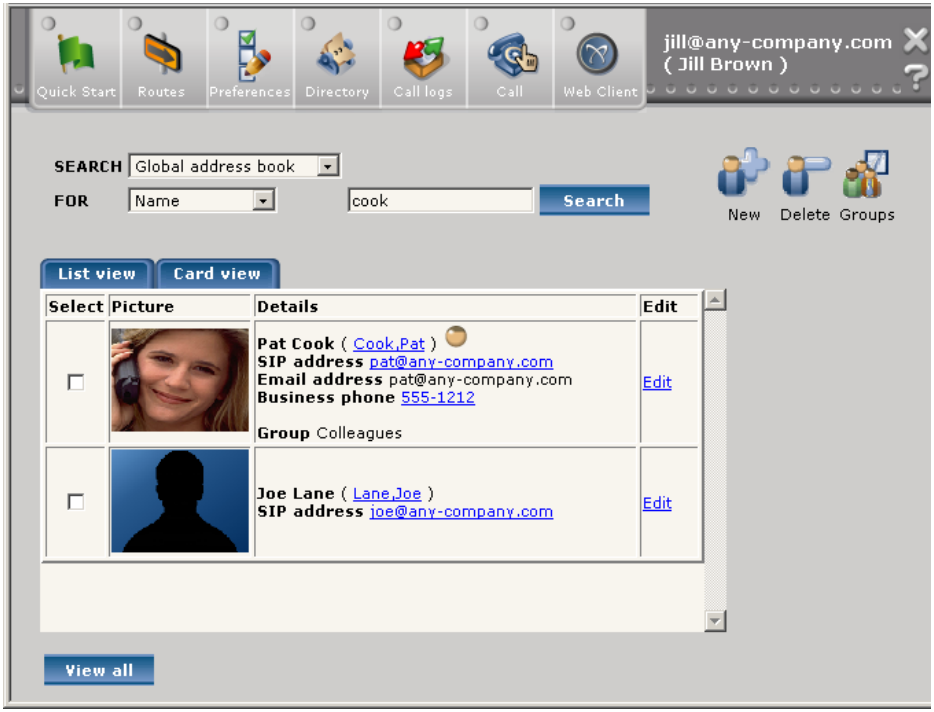
3 Enter your search criteria.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen, and so on.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria, refer to Appendix A, “Understanding Address Book Search Criteria,” on page 133.

4 Click **Search**. The results of your search appears in **List view**.

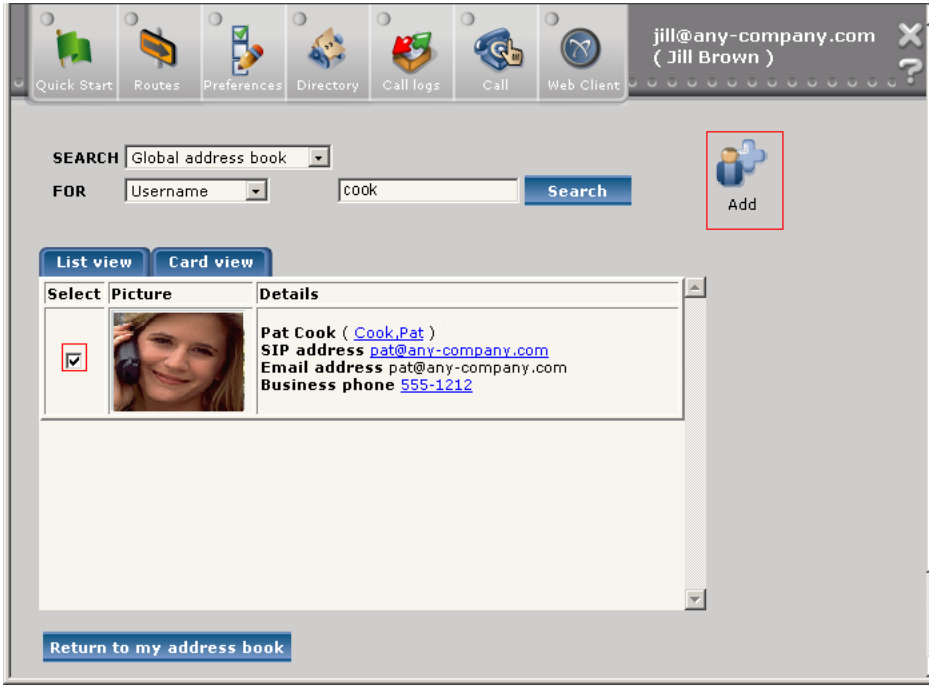
5 To see the results of your search in Card view, click the **Card View** tab. The global address book displays the user, or users, in your global address book that match the specified search criteria and includes a thumbnail picture of the user (if available).



Adding global address users to your personal address book

To select a user to add to your personal address book from the global address book (if enabled) - Card view or List view - you must first perform a search in the Global address book "Searching for a user" on page 82.

1 Following the search, enter a checkmark in the checkbox in the **Select** column next to the user (or number of users) you wish to add.

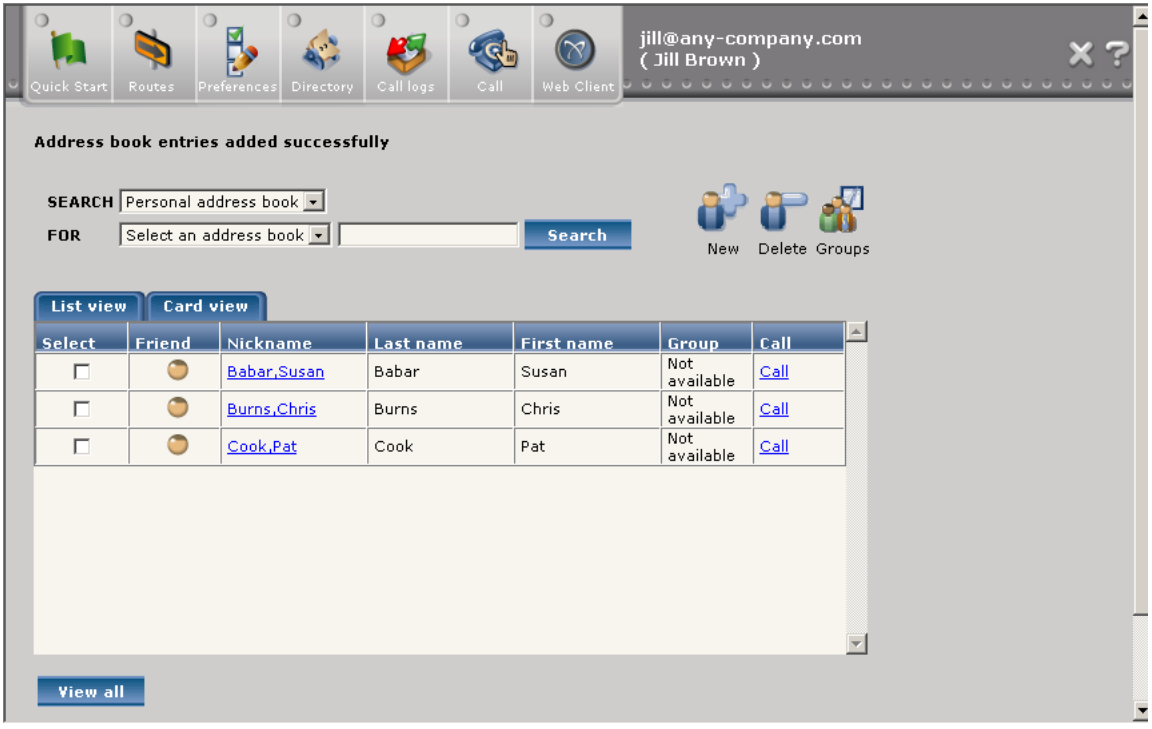


2 Click the **Add** icon to add selected entry/entries to the personal address book. The Adding address book entries window appears.

3 Check the **Add users as friends** checkbox. Designate a group if desired.

Note: You will receive an error message if you attempt to add users from your global address book that have the same **Last name** or **First name** as the **Nickname** field defined in your personal address book.

4 Click **OK**. Your personal address book appears, showing the entry you added from the global address book.



Chapter 4
Working with call logs

The Personal Agent allows you to view a list of incoming and outgoing calls made by any device that you are logged in to.

Topics in this section include

- "Viewing call logs" on page 91
- "Calling contacts from the call log" on page 92
- "Saving contacts from the call log information" on page 94
- "Clearing call log information" on page 94

Viewing call logs

To view your list of incoming and outgoing calls

1 Click the **Call logs** icon in the top navigation bar. The Call Logs page appears, showing the call log information of your inbox by default.

Your inbox shows information about the caller's name, the time and duration of the call, and caller address. The icons in the **Type** column of your inbox indicate whether you answered the call or not.

This icon...	Indicates that...
	the call was answered.
	the call was not answered.

2 Click on the Outbox tab to view the names of people you called, the time and duration of the calls, and their SIP addresses.

Note: Network-based call logs capture all missed calls irrespective of a caller leaving a voice mail or disconnecting without leaving a voice mail.

Calling contacts from the call log

To call a contact from the call logs in your inbox or outbox

1 Click the **Call logs** icon in the top navigation bar.

2 Select the **Inbox** or **Outbox** tab.

3 Click **Call** link beside the contact name. The Click to Call window appears.

4 Complete the following actions for **Ring me at:**

- **a** Device **-** select a device from the drop-down list that you wish to initiate the call **from**.
- **b** Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the personal address book contact.

5 Complete the following actions for **Make Call To:**

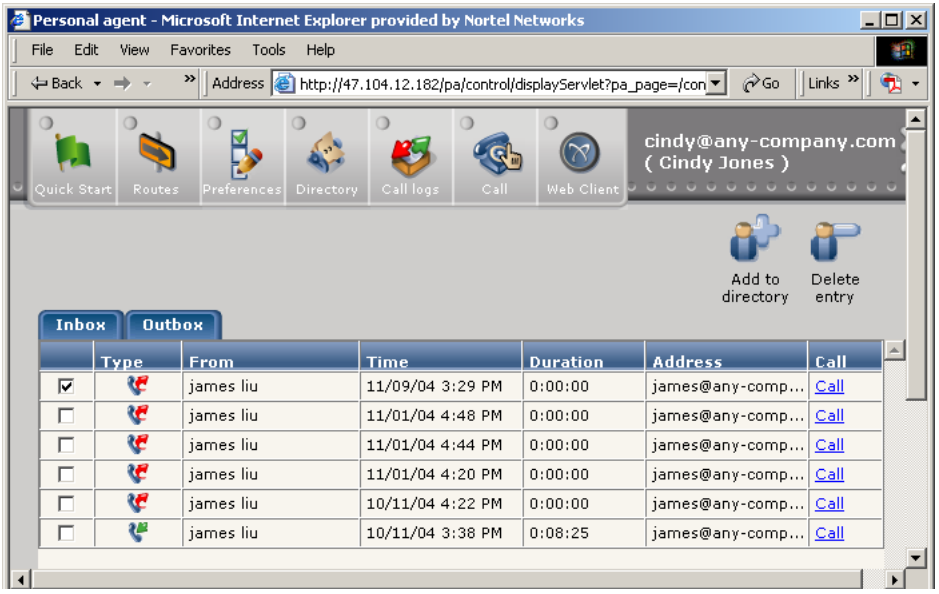
- **a** Device **-** select a device from the drop-down list that you wish to initiate the call **to**.
- **a** Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the contact in your personal address book.

6 Click **Call**. At this point, both sides of the call ring. The system waits for you to answer, and then initiates a second call to the contact in your personal address book.

Saving contacts from the call log information

To save a contact from a call log to your personal address book

1. Click the checkbox beside the name of the contact you want to save from your Inbox or your Outbox.



2. Click the **Add to directory** icon. The Directory page appears with a message confirming that the contact was successfully added. The new contact appears in the Directory list.

Clearing call log information

To remove one or more entry in a call log

1. Click the checkbox beside the name of the contact you want to delete.
2. Click the **Delete entry** icon. You are prompted to confirm the deletion.

3 Click **OK** to confirm the deletion. The Call logs page refreshes and the entry is gone.

Tip: The **Select all** button under the call log adds a checkmark to every entry in the call log. The **Clear all** button removes the checkmark beside entries in the call log.

Chapter 5
Using Click to call to make calls

The Personal Agent allows you to initiate calls to contacts in your personal address book as well as the global address book (if enabled by your system administrator in your domain) by using the Click to call functionality.

Using Click to call, you can enter a phone number or SIP address of the device where you want to take the call, then enter the called party number. The phone then rings at your preferred device. After answering, you are connected with the called party.

Tip: Ensure that your MCS client, either the Multimedia PC Client or Multimedia Web Client, is running when you use the **Click to call** icon to call another user. If your MCS client is not running, you cannot connect to the calling party using this icon.

Topics in this section include

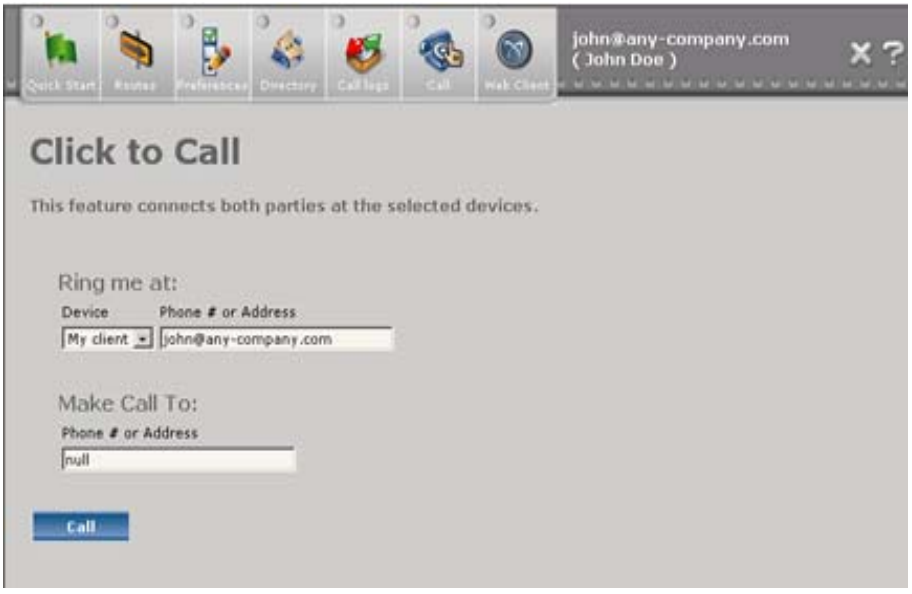
- "Using the Click to call icon" on page 98
- "Using Click to call from your personal address book" on page 102
- "Using Click to call from the global address book" on page 105

Using the Click to call icon

To initiate a call using the **Click to call** icon

1 Access the Personal Agent Quick Start page.

2 Click the **Call** icon from the top navigation menu or the **Click to call** link on the Quick Start page. The Click to Call page appears.



3 Modify the calling and called numbers of the contact (in your personal address book or the global address book of your system) that you are calling. If you do not want to use a pre-configured phone number or registered SIP address for the calling or called party, then enter a new number or registered SIP address.

Tip: Ensure that your MCS client, Multimedia PC Client or Multimedia Web Client, is running when you use the **Click to call** icon to call another user. If your MCS client is not running, you cannot connect to the calling party using this icon.

4 Click **Call**. At this point, your device is rung.

5 Click **Answer.** This initiates a second call to the contact you added in the Make Call To: field.

Once your contact answers your call, you can successfully start the conversation.

Using Click to call from your personal address book

To initiate a call from your personal address book

1 Locate the contact in your personal address book.

2 Click the **Call** link in the **Call** column (List view) or the phone number or SIP address link (Card view) for the contact in your personal address book. The Click to Call window appears.

3 Complete the following actions for **Ring me at:**

a Device **-** select a device from the drop-down list that you wish to initiate the call **from**.

b Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the personal address book contact.

4 Complete the following actions for **Make Call To:**

a Device **-** select a device from the drop-down list that you wish to initiate the call **to**.

b Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the contact in your personal address book.

5 Click **Call**. At this point, your device rings.

6 Click **Answer.** This initiates a second call to the contact in your personal address book.

Once your contact answers your call, you can successfully start the conversation.

Using Click to call from the global address book

To initiate a call from your global address book (if enabled)

1 Locate the user in the global address book.

john@any-company.com
(John Doe)
SEARCH Global address book
FOR Select a field
Search
New Delete Groups
List view Card view
Select Friend Nickname Last name First name Group Call
Brown,Jill Brown Jill Special Project Call
Burns,Chris Burns Chris Not available Call
Corry,Nancy Corry Nancy Work Team Call
Gonzalez,Don Gonzalez Don Not available Call
Henderson,Peter Henderson Peter Not available Call
Jill Brown Jill Not available Call
Joey Lane Joe Work Team Call
John Doe John Not available Call
View all

2 Click the **Call** link in the **Call** column (List view) or the phone number or SIP address link (Card view) for the contact in the global address book. The Click to Call window appears.

Personal agent - Microsoft Internet Explorer provided by...
Click to Call
This feature connects both parties at the selected devices.
Ring me at:
Device Phone # or Address
My client john@any-company.com
Make Call To:
Device Phone # or Address
Client jill@any-company.com
Call

3 Complete the following actions for **Ring me at:**

a. Device **-** select a device from the drop-down list that you wish to initiate the call **from**.

b. Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the user in your global address book.

4. Complete the following actions for **Make Call To:**

   a. Device **-** select a device from the drop-down list that you wish to initiate the call **to**.

   b. Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the user in your global address book.

5. Click **Call**. At this point, your device rings.

6. Click **Answer.** This initiates a second call to the contact in the global address book. Once your contact answers your call, you can successfully start the conversation.

Chapter 6
Using the Personal Agent Route Wizard

The Personal Agent Route Wizard solves the problem of having different contact numbers for different communication devices (office phone, home phone, mobile). Call screening allows the user to build a route or routes using the Route Wizard for all or specified incoming calls. Call screening also gives the option to block any anonymous callers.

Note: The ability to use the Personal Agent Route Wizard to set up routes for your incoming calls is dependent upon your service package. If Advanced screening is not enabled in your service package, then you cannot use the Personal Agent routing capabilities. If you do not have routing capability, a default route is defined for you that rings your phone, and, if you are subscribed to the voicemail service, the call is sent to voicemail.

Note: The Assisted user uses the Route wizard in the Personal Agent to route incoming calls to the designated assistant groups. For more information, refer to the *MCS Feature Description Guide*.

Topics in this section include

- "What is routing?" on page 108
- "What is the Personal Agent Route wizard?" on page 108
- "Using the Personal Agent Route wizard" on page 110

Tip: Some features, such as Call forward, can be set at the Nortel IP Phones 2002 and 2004 and may override the routes that you set on the Personal Agent.

What is routing?

A route allows you to perform different actions on your incoming calls and/or Instant Messages based on a set of conditions or exceptions. For example, you can create a route named "Lunch" that specifies a condition that calls received between 12:00 pm and 1:00 pm Monday through Friday are to be affected by the route. The route "Lunch" would also have an action that specifies that calls that are affected by the route will ring your mobile phone first, and then send the call to voicemail.

Tip: Routes are applied to incoming calls in the order in which they are listed in the List of Routes window. Click **Move up** or **Move down** to change the order of how your incoming calls are treated.

What is the Personal Agent Route wizard?

You can create routes with the Personal Agent Route wizard. The wizard is a step-by-step procedure that makes the task of creating rules and conditions for your incoming calls easier.

Warning: When using the route wizard, several pop-ups appear to help you create a route correctly. However, if you use a pop-up blocker software on your PC, it may prevent the Personal Agent pop-ups from appearing on your screen. To ensure that the pop-ups in your Personal Agent work accurately, you must disable the pop-up blockers.

Use the Route wizard to

- define routes for how your incoming calls and Instant Messages are handled

Note: Instant Messaging must be enabled in your service package in order to see the option that allows you to be able to send and receive instant messages.

- specify conditions as to how and on what devices specific calls should be presented to you in a simultaneous or sequential fashion

- define personalized time blocks to further define your routes so that you are always in reach
- send an Instant Message (IM) when processing a ring list

Note: Instant Messaging must be enabled in your service package to be able to send an IM when processing a ring list.

Understanding the Route wizard steps

The following table describes the steps to follow when you create a route using the Personal Agent Route wizard.

This step...		Specifies...
1	Initiate action	the main action or actions that initiates the processing of the route. There are two options listed here to select from: "**When a call is received**" or "**When an Instant Message** (if enabled in your service package) is received". Select the desired option by clicking on the appropriate checkbox.
2	Conditions	filtering of conditions respective to the call originator and the time of day that must apply before the Actions in Step 3 can take place.
3	Actions	what action or actions are performed when a call is received. Actions are defined with respect to the services enabled in your service package.
4	Exceptions	what are the exceptions to the filtering conditions defined in Step 2.
5	Finish	name of the route, and whether the route should be active (or not), and saved (or not).

Navigating the Route wizard

When you have entered the required data for each step, click

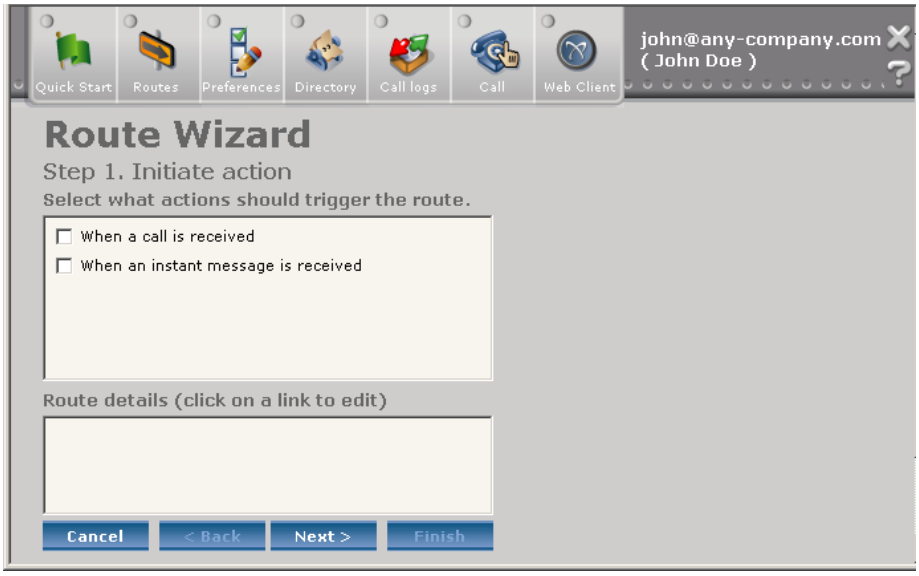
- **Next** to go to the next step.
- **Back** to change your decision.
- **Cancel** to cancel the creation or modify the route.
- **Finish** to complete a step.
- **Save** to save the route.

Using the Personal Agent Route wizard

To create routes using the Personal Agent Route wizard

1 Click the **Route** icon from the Personal Agent Quick Start page or from the top navigation menu. The first time you use the Route Wizard, the List of Routes page appears with a default (permanent) route checked and greyed out.

2 Click **New** to go to Step 1, Initiate action. The Initiate action page appears.



Note: If you do not have Instant Messaging enabled in your service package, you will not see the Instant Messaging option

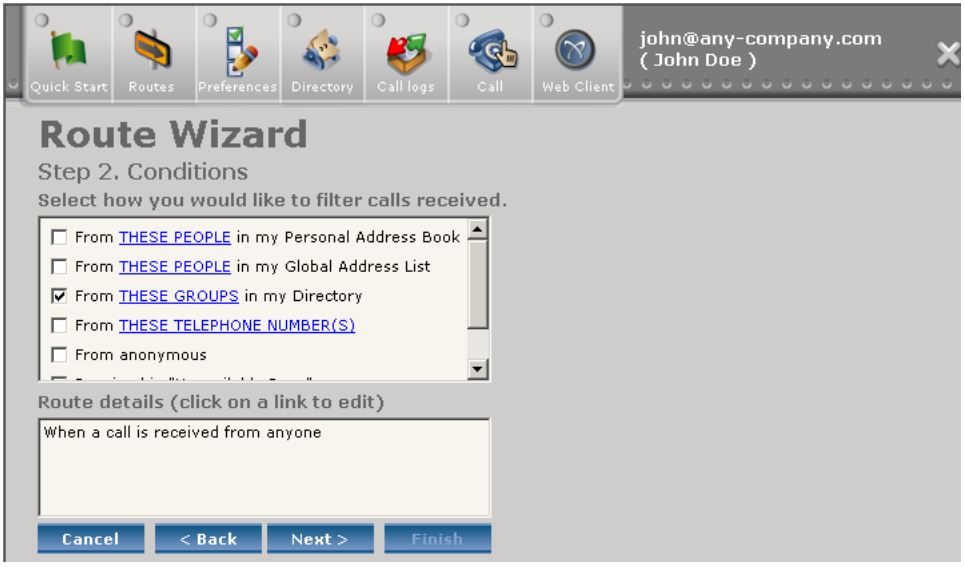
Step 1: Initiating action

In Step 1, you specify the main action or actions that initiate the processing of the route. Currently, the only action you can take at Step 1 is "When a call is received." From the initiate action page, click **Next** to go to Step 2, Conditions.

Step 2: Specifying conditions

Note: If your system administrator has disabled the global address book for your domain, you do not have the option to select a user (or users) from the global address book in Step 2.

Step 2 of the Route Wizard allows you to specify the following conditions to filter how your incoming calls will be handled by the route you are setting up.



Click this link...	To specify...
From THESE PEOPLE in my Personal Address Book	a contact (or contacts) from your personal address book that you want to include in the condition.
From THESE PEOPLE in my Global Address List (if enbabled)	a user (or users) from the global address book (if enabled) that you want to include in the condition.
From THESE GROUPS	the lists of contacts that you have organized into meaningful groups in your personal address book (for example, Friends, Family, Work, Projects) that you want to include in the condition.

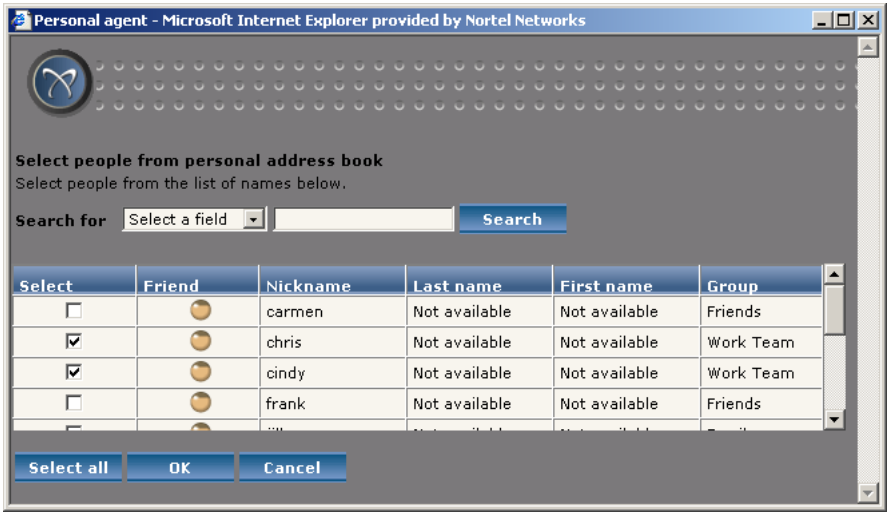
Click this link...	To specify...
From THESE TELEPHONE NUMBER(S)	the SIP Address or phone number of the person (or persons) calling you.
SPECIFIC DAY/TIME RANGE(S)	the days and hours of the day and week when you want the condition to apply. For information on using the My Times feature to set up Day/Time ranges, see "Setting up My Times date and time ranges" on page 23.

Note: As a Converged desktop user, when you create a new route, you must ensure that your contact information is completely populated in your personal address book. Make sure that the preferred audio device (PAD) number is populated as a valid phone number in the Contact Details window. The PAD number is usually your business phone number, but it could also be your home phone or mobile number. For more details, refer to Step 3 in "Editing a contact - List view" on page 70.

Specifying contacts from your personal address book

To specify a contact (or contacts) from your personal address book as a condition

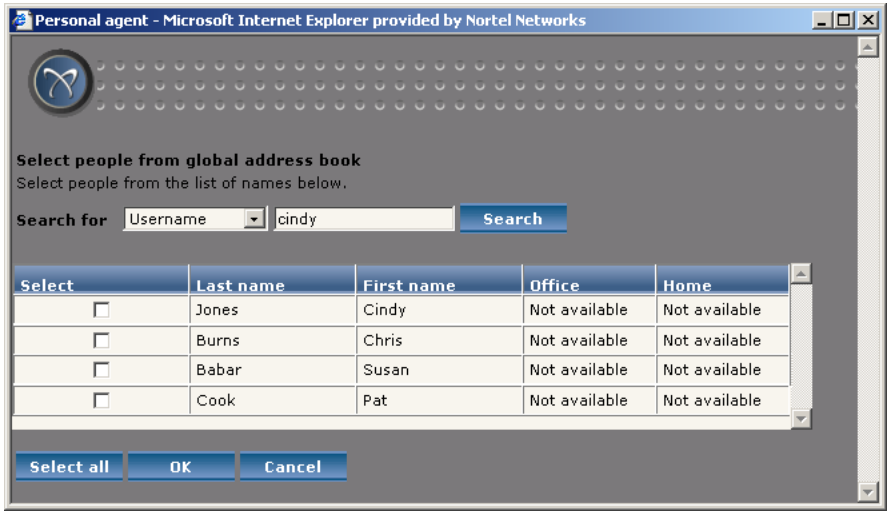
1 Click the link, **From THESE PEOPLE**. Your personal address book window appears.



2 Enter a search criteria in the **Search for:** field to select a contact (or contacts) from your personal address book.

3 Select a contact (or contacts) from the **Select** column, or click **Select all** to select all contacts to include in the condition.

4 Click **OK** to accept the selected contacts, or **Cancel** to quit this window. The Step 2. Conditions window appears with the conditions you specified from your personal address book listed in the Route details window.



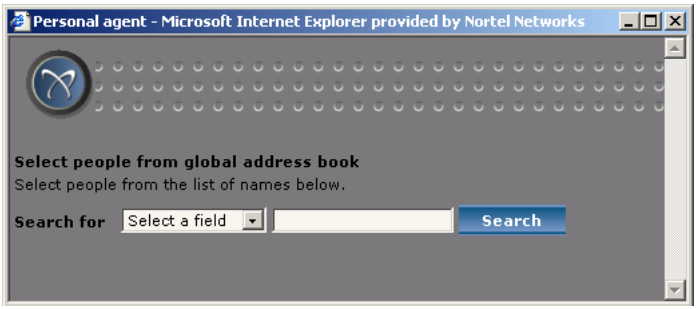
5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next** to go to the next step.

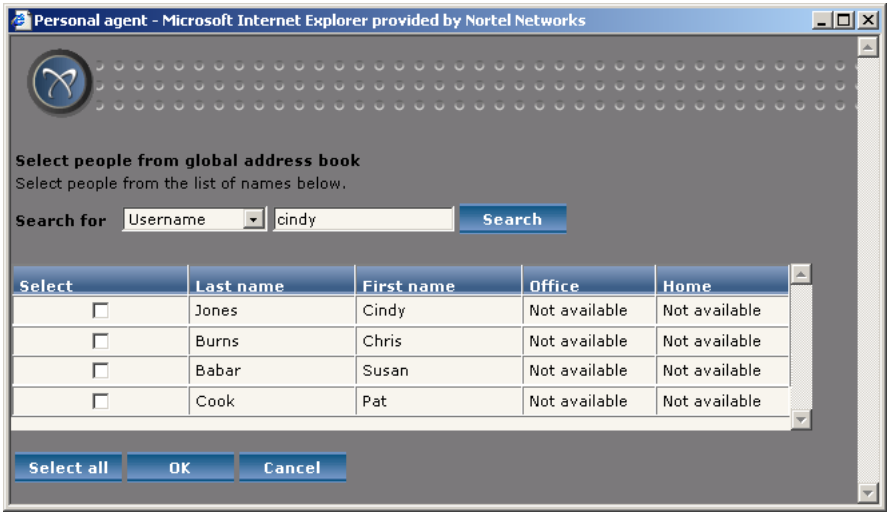
Specifying users from the global address book

To specify a user (or more than one user) from the global address book (if enabled) as a condition

1 Click the link, **THESE PEOPLE**. The global address book window appears.

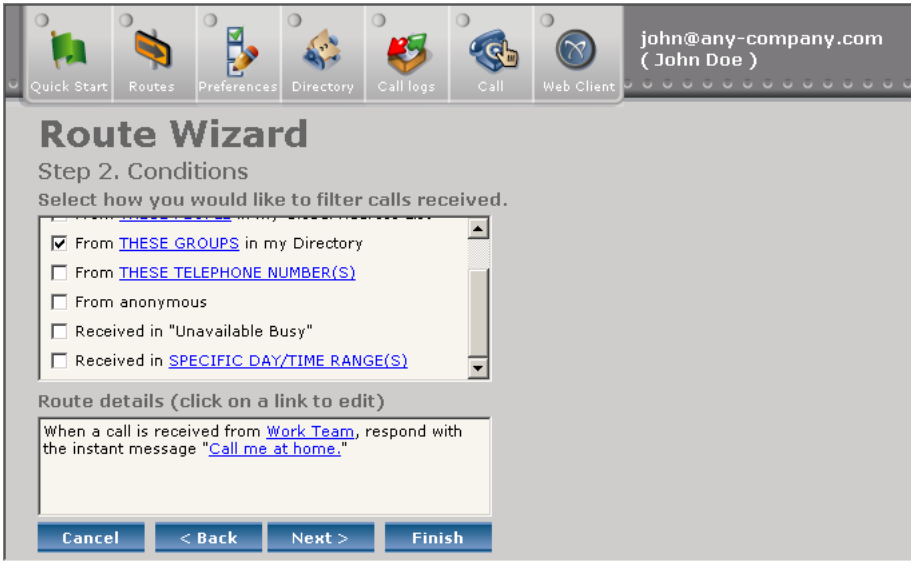

Personal agent - Microsoft Internet Explorer provided by Nortel Networks
Select people from global address book
Select people from the list of names below.
Search for
Select a field
Search

2 Enter a search criteria in the **Search for:** field to select a user (or group of users) from the global address book. The result of your search appears in the window below.



3 Select a user (or group of users) from the **Select** column, or click **Select all** to select all users from the global address book.

4 Click **OK** to accept the selected users, or **Cancel** to quit this window. The Step 2. Conditions window appears with the global address conditions you specified listed in the Route details window.



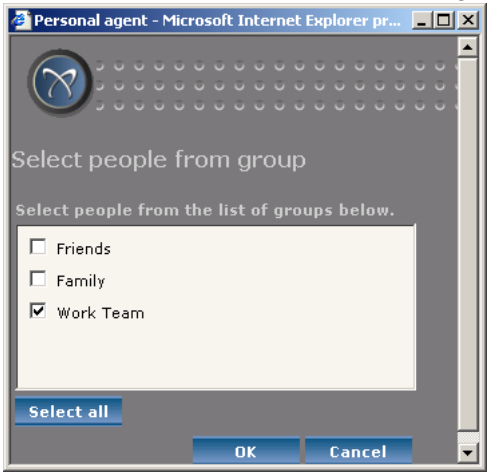
5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next** to go to the next step.

Specifying groups

To specify a group as a condition

1 Click the **THESE GROUPS** link. The group window appears.



2 Select the group (or groups) of people that you have organized into groups (such as Family, or Friends) as defined in your personal address book.

3 Click **Select all** to select all groups.

4 Click **OK** to accept the selected groups, or **Cancel** to quit this window. The Step 2. Conditions window appears with the group conditions you specified listed in the Route details window.

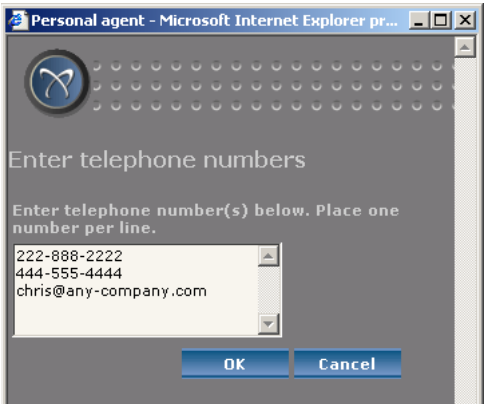
5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next** to go to the next step.

Specifying telephone numbers

To specify a phone number, a list of phone numbers, or a SIP Address of an incoming call as a condition

1 Click the **THESE TELEPHONE NUMBER(S)** link. The telephone number window appears.



2 Enter a phone number (or a list of phone numbers) or a SIP address. (Add one number or SIP address for each line that the filter will apply to.)

3 Click **OK** to accept the selected phone numbers or SIP addresses, or **Cancel** to quit this window. The Step 2 Conditions window appears with the phone conditions you specified listed in the Route details window.

4 To edit the condition, click the link in the Route details window.

5 Continue to specify conditions, or click **Next** to go to the next step.

Specifying a condition for an anonymous incoming call

You can set up the following conditions to handle incoming calls from an anonymous caller:

- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- specify the call to be sent to a particular phone number

For information on setting up the actions for an incoming anonymous call, refer to "Specifying an ordered list for an incoming call" on page 125 and "Specifying a rejection message" on page 127.

To specify an anonymous caller condition

1 Select the **Received in "Unavailable Busy"** option in the Step 2: Conditions window.

2 Continue to specify conditions, or click **Next** to go to the next step.

Specifying a condition for 'Unavailable Busy'

You can set up the following conditions to handle incoming calls when your Presence state is set to 'Unavailable Busy':

- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- specify the call to be sent to a particular phone number

Tip: This parameter is only available if Presence-based routing is enabled in your service package.

For information on setting up the actions for an incoming calls while you are 'Unavailable Busy', see "Specifying an ordered list for an incoming call" on page 125 and "Specifying a rejection message" on page 127.

To specify an incoming call condition while ‘Unavailable Busy’

1 Select the **From anonymous** option in the Step 2: Conditions window.

2 Continue to specify conditions, or click **Next** to go to the next step.

Specifying Day/Time ranges

1 To specify the days and times ranges for the condition to apply.

2 Click the **SPECIFIC DAY/TIME RANGE(S** link. The My Times page appears.

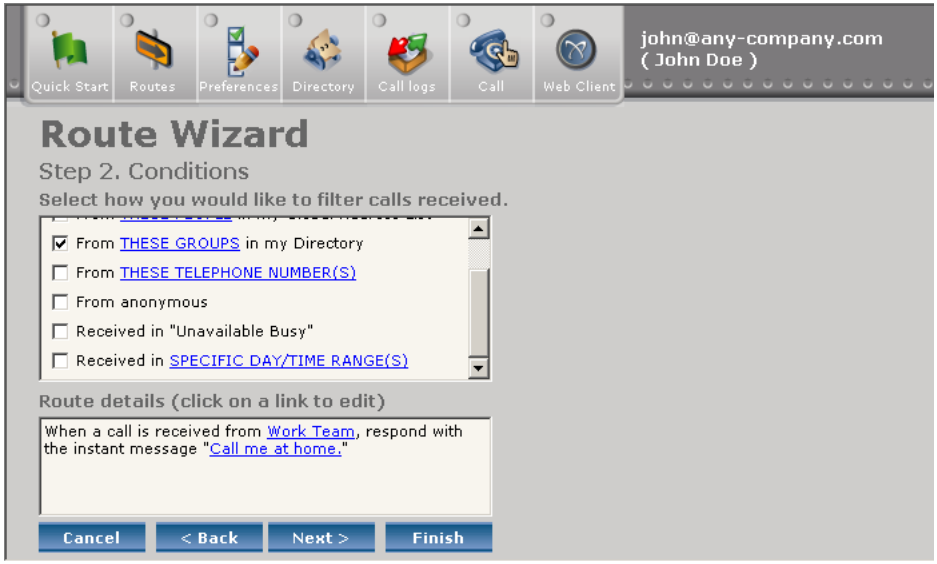
Tip: For complete information on setting up My Times Day/Times ranges, see “Setting up My Times date and time ranges” on page 23.

3 Select a previously defined day and time range (for example, My Office Hours).

View the graphic display of highlighted My Times.

4 Use the buttons to create new My Times Day/Time ranges or manage existing My Time Day/Time ranges.

5 Click **Save** to accept selected My Times, or **Cancel** to quit this window. The Step 2 Conditions window appears with the My Times conditions you specified listed in the Route details window.



6 To edit the condition, click the link in the Route details window.

7 Continue to specify conditions, or click **Next** to go to the next step.

Step 3: Actions

Step 3 of the Route Wizard allows you to specify what action or actions to perform on your incoming calls. For example, you can set up the following mutually exclusive actions:

- specify numbers to ring simultaneously or sequentially in ordered lists
- send a rejection message (PSTN callers will receive a busy tone)
- send the request to email (PSTN callers will receive a busy tone)
- pop up a call window

- send the call to voice mail

Note: Actions are defined with respect to the services, such as Converged desktop or Advanced screening, that are enabled in your service package. The option to pop up a call window or send the call to voice mail actions are only available when you are subscribed to the Converged desktop or Voice Mail services, respectively.

Specifying ordered lists

The Personal Agent allows you to set up how and where you want your incoming calls to ring by using ordered lists. An ordered list is a group of SIP addresses or phone numbers associated with your user name (the name you register under) in your organization's or service provider's user database. The basic purpose of an ordered list is to enable your incoming calls to follow you if you are not at your desk or primary device location.

Using ordered lists, you can specify the sequence of phone numbers to ring first, second, and so on. You can then specify how many times the phone in each list should ring. Finally, you can specify whether or not the incoming call should go to voice mail (if you are subscribed to and provisioned for voice mail).

Tip: The maximum number of ordered lists and phone numbers in each list is restricted by your service package.

Your calls are routed differently based on who is calling you. Based on your ordered lists, incoming calls can be forwarded, or routed, to any number of devices or clients. You can “push” a web page in response to an incoming call, as well as send a response in the form of an instant message.

Specifying an ordered list for an incoming call

To specify an ordered list for your incoming calls

1 Select the option to ring your devices in an ordered list.

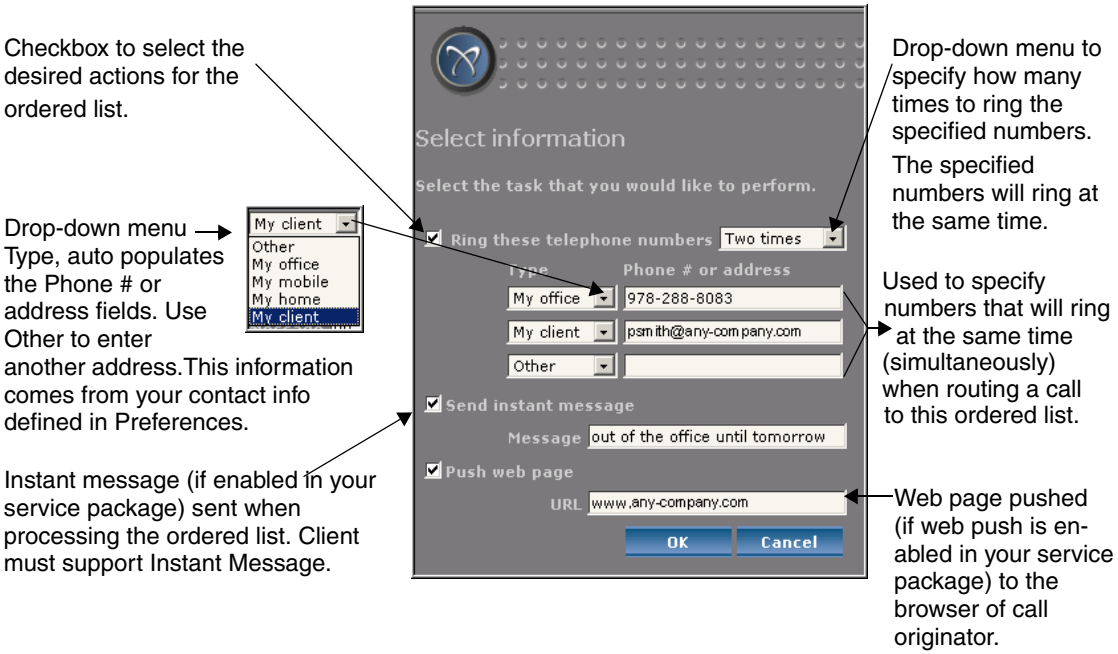
Quick Start
Routes
Preferences
Directory
Call logs
Call
Web Client
john@any-company.com
(John Doe)
Route Wizard
Step 3. Actions
Select what actions you would like to perform.
Ring my devices in the following ordered lists
Ring THESE NUMBERS first in my list
Ring THESE NUMBERS second in my list
Rejection MESSAGE (PSTN callers receive busy tone)
Request an email (PSTN callers receive busy tone)
Route details (click on a link to edit)
When a call is received from Work Team, respond with the instant message "Call me at home."
Cancel
< Back
Next >
Finish

Note: The options that will be available to the user in this window will vary based on the service provider package selected by your service provider.

Note: The number of “ordered lists” grows depending on the Advanced Screening service parameters in your service package. If you have Voicemail enabled in your service package, there will be an additional option for "If no answer then send to voicemail" when creating an ordered list.

If you do not have Voicemail enabled, then the Personal Agent Route Wizard does not create a route that terminates a call to voice mail. However, if Voicemail is enabled, and the Advanced Screening service is not assigned to your service package, then only the default route is available.

2 Enter a check mark in the first option box in the list. Click the **THESE NUMBERS** link to specify a list of numbers that will be rung when the incoming call reaches a ringlist. A window appears that allows you to select any, or all, of the following actions for the incoming call.


Checkbox to select the desired actions for the ordered list.
Drop-down menu Type, auto populates the Phone # or address fields. Use Other to enter another address.This information comes from your contact info defined in Preferences.
Instant message (if enabled in your service package) sent when processing the ordered list. Client must support Instant Message.
Drop-down menu to specify how many times to ring the specified numbers.
The specified numbers will ring at the same time.
Used to specify numbers that will ring at the same time (simultaneously) when routing a call to this ordered list.
Web page pushed (if web push is enabled in your service package) to the browser of call originator.
Select information
Select the task that you would like to perform.
Ring these telephone numbers
Two times
Type
Phone # or address
My office
978-288-8083
My client
psmith@any-company.com
Other
Send instant message
Message
out of the office until tomorrow
Push web page
URL
www.any-company.com
OK
Cancel
My client
Other
My office
My mobile
My home
My client

3 Select the actions for the incoming call, and click **OK** to return to the Actions page.

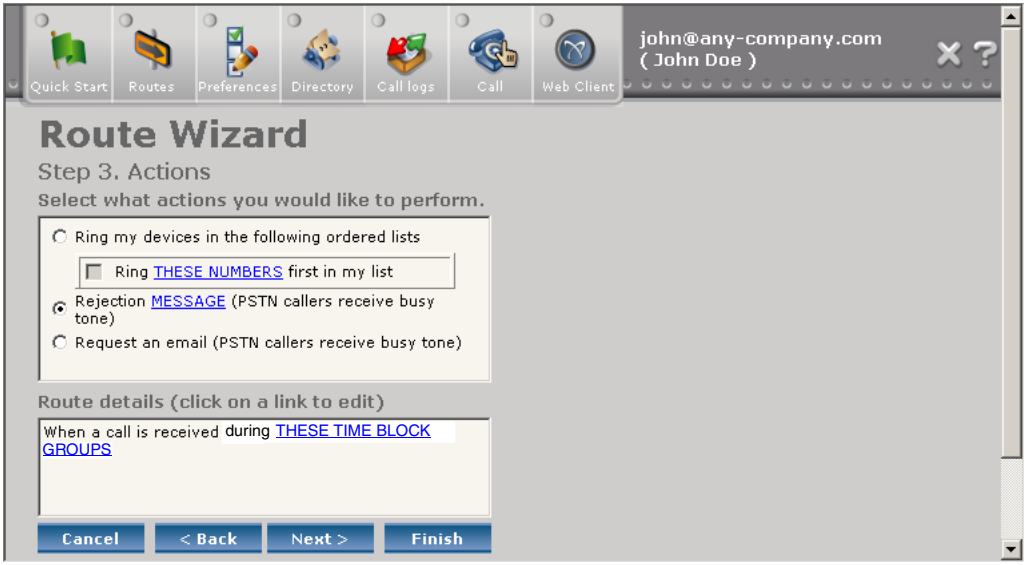
4 Continue specifying ordered lists. To edit the ordered list, click the links in the Route details window.

5 If you are finished specifying conditions, click **Finish** to name your route and save your route details. If you wish to specify exceptions, click **Next**.

Specifying a rejection message

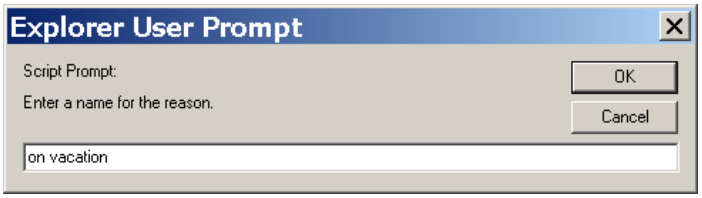
To specify a reject message

1 Select the **Rejection** option in the window that specifies how you would like to filter calls received.

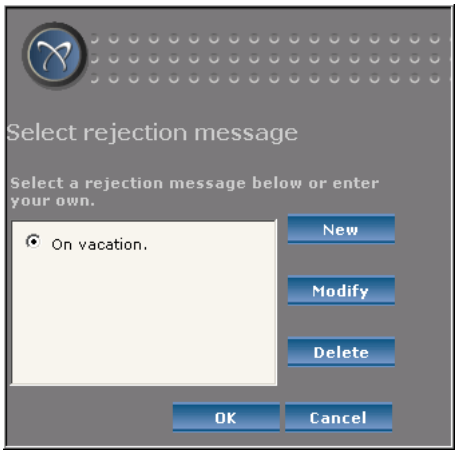


2 Click the **MESSAGE** link to compose a message to display when the route is activated for an incoming call from an anonymous caller. The Select rejection message window appears.

3 Click **New** to compose a rejection message. The Explorer User Prompt window appears.



4 Enter the text for your message in the dialog box and Click **OK**. The rejection message now appears in the Select rejection message window.

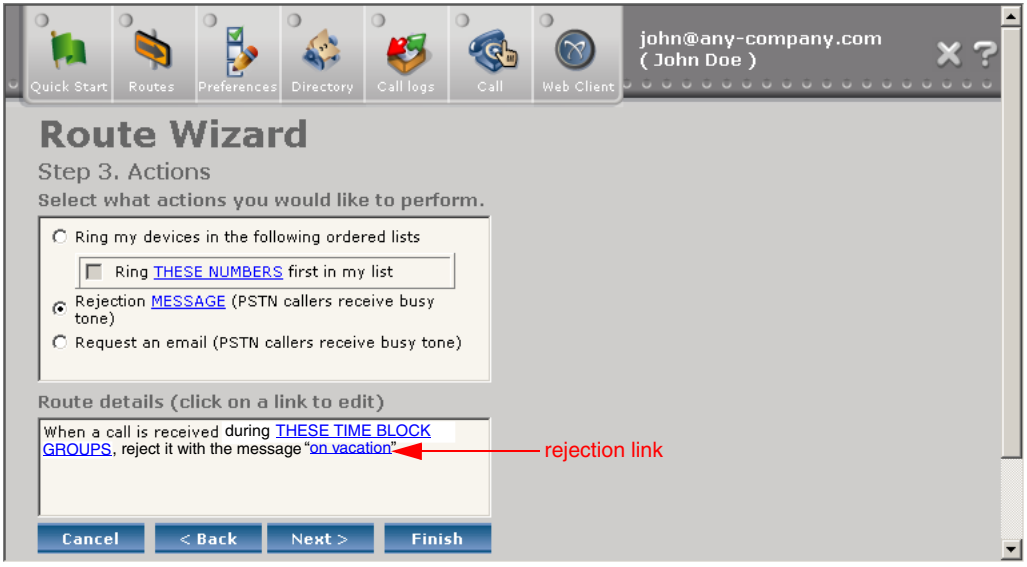


5 Click on the circle beside the rejection message to make it active.

6 Click **OK** to return to the Route wizard. Your reject reason appears in the Route details window.

7 To edit the message, click the rejection link in the Route details window.

8 Continue to specify conditions, or click **Next** to go to the next step.


Quick Start
Routes
Preferences
Directory
Call logs
Call
Web Client
john@any-company.com
(John Doe)
Route Wizard
Step 3. Actions
Select what actions you would like to perform.
Ring my devices in the following ordered lists
Ring THESE NUMBERS first in my list
Rejection MESSAGE (PSTN callers receive busy tone)
Request an email (PSTN callers receive busy tone)
Route details (click on a link to edit)
When a call is received during THESE TIME BLOCK GROUPS, reject it with the message "on vacation"
rejection link
Cancel
< Back
Next >
Finish

Specifying an email request

To specify an email request when you receive an incoming call, select the option to request an email (PSTN callers will receive a busy tone).

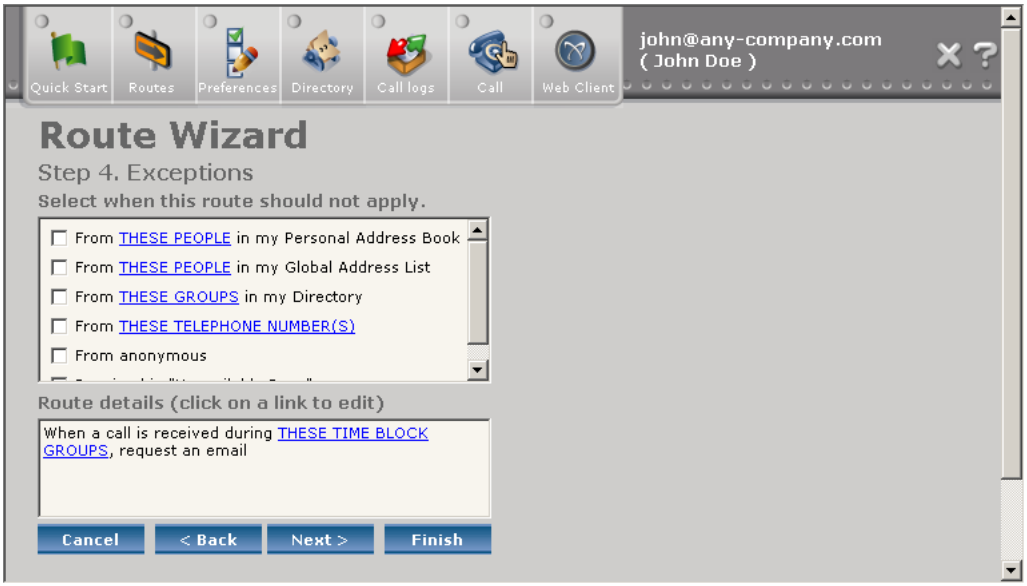
With this option, the caller is asked to send an email to the email address of the user that they called. An email window opens up, with the email address field autofilled with the address of the person requesting an email. The phone never rings.

Personal agent - Microsoft Internet Explorer provided by Nortel Networks
File Edit View Favorites Tools Help
Quick Start
Routes
Preferences
Directory
Call logs
Call
Web Client
john@any-company.com
(John Doe)
Route Wizard
Step 3. Actions
Select what actions you would like to perform.
Ring my devices in the following ordered lists
Ring THESE NUMBERS first in my list
Rejection MESSAGE (PSTN callers receive busy tone)
Request an email (PSTN callers receive busy tone) during THESE TIME BLOCK GROUPS, request an email
Route details (click on a link to edit)
When a call is received during THESE TIME BLOCK GROUPS, request an email
Cancel
< Back
Next >
Finish

Step 4: Exceptions

Note: If your system administrator has disabled the global address book for your domain, you do not have the option to select a user (or users) from the global address book in Step 4.

Step 4 of the route wizard allows you to specify exceptions to the conditions that you specified in Step 2: Conditions. The method for specifying exceptions is consistent with the method for specifying conditions. See "Step 2: Specifying conditions" on page 112 for information on specifying conditions.



The following links are available as exceptions

- **THESE PEOPLE** (in your personal address book)
- **THESE PEOPLE** (in the global address book, if enabled in your domain)
- **THESE GROUPS** (in your directory)
- **THESE TELEPHONE NUMBER(S)**
- From anonymous
- Received in “Unavailable Busy”

Tip: The **SPECIFIC DAY/TIME RANGE(S)** link is not available as an exception.

The Received from “Unavailable Busy” parameter is only available if you have Presence Based Routing enabled in your service package.

To edit the condition, click the link in the Route details window. To go to the next step, click **Next**.

Step 5: Finish

Before you complete the final step in setting up your route, it is recommended that you view all the route details to ensure that you are satisfied with the conditions, actions, and exceptions.

If the route is complete, you can now name the route and set the route to active.

1 Specify a unique name for the route in the text box.

2 Select the Make this route active checkbox.

3 Click **Save** to save the route information and activate the route. Incoming calls will now be processed according to your active route(s).

Appendix A
Understanding Address Book Search Criteria

Topics in this section include

- "Personal Address Book search criteria" on page 134
- "Global Address Book search criteria" on page 136

Note: The only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Personal Address Book search criteria

The following table provides a detailed description of the Personal Address Book search criteria.

Field	Example search criteria	Results
Nickname	*nick	Returns entries ending with nick, and starting with anything (appends *).
	nick	Same as *nick.
	nick	Finds anything that starts with nick (appends *).
	nick*	Same as nick.
Name	name	Returns anything starting with first name and starting with last name (appends * to both).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	firstname lastname	Returns anything starting with last name and starting with first name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname*,*firstname*	Same as "lastname*,*firstname".

Field	Example search criteria	Results
	*lastname, firstname	Returns entries containing last name and starting with firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name (	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.
SIP Address	*sipAddress	Returns entries containing sipAddress.
	sipAddress*	Same as *sipAddress.
	sipAddress*	Returns entries starting with sipAddress.
	sipAddress	Same as sipAddress*.
Friends	Rules similar to the last name and first name search apply to this search criteria, but the search is carried out for the string with the condition that the entry being searched for is a Friend.	
Group	*groupName	Returns entries belonging to group containing groupName in the name of the group (appends *).
	groupName	Same as *groupName
	groupName	Finds entries belonging to the group starting with groupName (appends *).
	groupName*	Same as groupName.
no criteria		Returns all the entries in the address book.

Global Address Book search criteria

Note: If your system administrator has disabled the global address book for your domain, you will not see the option to select the global address book in the SEARCH dropdown menu.

The following table provides a detailed description of the Global Address Book search criteria.

Note: The only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Field	Example search criteria	Results
Username	user@domain*	Returns entries which have username starting with user@domain.
	user@domain	Same as user@domain*.
	user*	Returns entries which have username starting with user.
	user	Returns entries containing user in the username.
Name	name	Returns anything with first name or last name starting with name (appends * at end).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	"name"	Returns all users that have the last name or first name that match the search criteria within the quotation marks.

Field	Example search criteria	Results
Name	firstname lastname	Returns anything starting with first name and starting with last name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	Same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.

Index

Numbers

200x option 29

A

acronyms viii
address
  definition 4
  SIP address 4
advanced screening parameter 23
assistant console 40
assistant support 40
Assisted user 107
audience vii
automatic presence
  definition 6
  inactivity timer option 44
  modifying options 43
  report when inactive option 44
  report when on the phone option 44

B

banned watcher's list 42

C

Call Waiting Disable 40
Calling Line ID Restriction 40
Calling Line Identification 54
card view
  personal address book 59
  viewing contacts 65
Click to Call 5
  description 97
  from global address book 105
  from personal address book 102
  initiating a call 98
contact information
  business phone field 18
  cell phone field 19
  email field 18
  fax field 19
  first name field 18
  home phone field 19
  last name field 18
  locale field 19
  modifying 18
  pager field 19
  time zone field 19
contacts
  initiating a call (personal address book) 64
  search criteria (personal address book) 61
  searching (personal address book) 61
converged desktop service package option 39

D

device access service package option 40
Directory icon 14

E

Editing a contact 70

F

Friends
  adding a contact 74

definition 5
deleting a contact 77

G

global address book
accessing 78
add icon 88
adding a user 87
card view 85
definition 5
displaying users 78
initiating a call to user 85
search criteria 79
searching 82
sorting 81
table of search criteria 136
viewing user details 84
Group icon 73

H

hardware requirements
minimum 3
recommended 3
help
Help icon 15
rollover help 16
using 15
hot line service package option 40

I

IM Chatroom 40
IP Phones 2002 and 2004 preferences 29
200x option 35
changing subject list order 30
creating a subject list 29
personalized presence status 34
reordering reasons 33
specifying reasons 31

L

list view
personal address book 59
List View tab (personal address book) 60

M

Meet me audio conferencing 51
Access Code 52
changing chairperson PIN 53
Dial-In Number 52
service package option 39
viewing bridge details 51
Music On Hold 40
My Times
adding new day and time range 23
copying a day and time range 28
day/time combinations 24
day/time details window 26
deleting a day and time range 28
modifying 27
removing day/time ranges 26
renaming a day and time range 28

N

Net6 Support 40
Network Call Logs 40

P

password
changing 19
personal address book 58
adding a contact 69
adding a Friend 74
adding a group 73
definition 5
deleting a contact 73
editing a contact (Card view) 71
editing a contact (List view) 70
group icon 59
initiating a call 64

list view 60
new contact icon 59
searching for a contact 61
sorting contacts 60
storing addresses 4
table of search criteria 134
viewing contact details 63

Personal Agent
accessing 8
before you begin 2
description 1
exiting 15
interface, understanding 13
logging in 10
route wizard 107
services and features 2

picture caller ID
adding 21
deleting 22
previewing 22
resetting 22
shadow figure 21
size limits 22
updating 21
viewing 21

preferences
Meet Me option 37
presence option 36
service package 36
service package option 36

Preferences icon 14

preferences, setting up 17

presence
definition 6

presence indicator
active available 6
active on the phone 6
connected 6
connected inactive 6
unavailable 7
unknown 7

presence service package option 39

publications, hard copy viii

Q

QoS service package option 39

Quick Start icon 14

Quick Start landing page, navigating 14

R

related publications viii

route wizard
actions 123
email request 130
ordered lists 124
rejection message 127
activating the route 132
definition 109
exceptions 130
from groups in the global address book 131
from people in the global address book 131
from people in the personal address book 131
initiating action 111
navigating 109
specifying conditions 112
contacts from personal address book 112
day/time ranges 121
from anonymous call 119
groups 116
telephone numbers 118
users from the global address book 114
table of steps and actions 109

Routes icon 14

routing
definition 108

S

service package
Ad hoc conferencing option 39
advanced addressbook option 40
advanced screening 39

converged desktop option 39
definition 4
device access restriction option 40
hot line 40
Meet me conferencing option 39
presence option 39
QoS option 39
video option 39
viewing services 37
voice mail option 39
services, viewing and modifying 36
software requirements
minimum 3
recommended 3

T

technical publications viii
technical support ix
text conventions viii

U

unavailable busy 120
Unified Communications 40

V

video service package option 39
voice mail service package option 39

W

Watch List
definition 42
watcher's list 41
Web Client icon 15
wildcard symbol 62